MAKING THE INVISIBLE COUNT:

DEVELOPING PARTICIPATORY INDICATORS FOR GENDER EQUITY IN A

FAIR TRADE COFFEE COOPERATIVE IN NICARAGUA

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Abstract

Reducing health disparities requires intervention on the social determinants of health, as well as a means to monitor and evaluate these actions. Indicators are powerful evaluation tools that can support these efforts, but they are often developed without the input of those being "measured" and invariably reflect the value judgments of those who create them. This is particularly evident in the measurement of subjective social constructs such as gender equity, and the participation and collaboration of the intended beneficiaries are critical to the creation of relevant and useful indicators. These issues are examined in the context of a study to develop indicators to measure gender equity in the Nicaraguan Fair Trade coffee cooperative PROCOCER.

Recent studies report that Fair Trade cooperatives are not adequately addressing the needs of its women members. Indicators can provide cooperatives with a consistent means to plan, implement, and sustain actions to improve gender equity. This study used participatory and feminist research methods to develop indicators based on focus groups and interviews with women members of PROCOCER, the cooperative staff, and external experts.

The findings suggest that the cooperative has a role in promoting gender equity not only at the organizational level, but in the member families as well. Moreover, gender equity requires the empowerment of women in four broad dimensions of measurement: economic, political, sociocultural, and wellbeing. The indicator set proposes 22 objective and subjective indicators for immediate use by the cooperative and 7 indicators for future integration, mirroring its evolving gender strategy. The results also highlight salient lessons from the participatory process of indicator development, where the selected indicators were inherently shaped by the organizational context, the emerging research partnership, and the unique study constraints. These findings speak to the need for continued efforts to develop a critical awareness and organizational response to gender inequities, as well as the importance of providing spaces for women to define their own tools of evaluation.

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List of abbreviations

AMPRONAC	Asociación de Mujeres Ante La Problemática Nacional
AMNLAE	Asociación de Mujeres Nicaragüenses Luisa Amanda Espinoza
Cafénica	Asociación de Cooperativas de Pequeños Productores de Café de Nicaragua
CBPR	Community-based Participatory Research
CDM	Comité de Decisión Municipal
CECOCAFEN	Central de Cooperativas Cafetaleras del Norte
CTT	Comité de Trabajo Territorial
FEM	Fundación Entre Mujeres
FIDEG	Fundación Internacional para el Desafío Económico Global
FLO	Fairtrade International
FSLN	Frente Sandinista de Liberación Nacional
FT	Fair Trade
GDI	Gender-Related Development Index
GEM	Gender Empowerment Measure
GII	Gender Inequality Index
GMAS	Grupo de Mujeres en Ahorro Solidario
INIDE	Instituto Nacional de Información de Desarrollo
MMFC	Movimiento de Mujeres "Flores del Café"
NGO	Non-governmental organization
PROCOCER	Cooperativa Multisectorial de Productores de Café Orgánico Certificado Las Segovias R.L.
SNV	Netherlands Development Organization
UNDP	United Nations Development Program

It isn't that the man has more rights than we do, because we also are women and we have the same rights that the men have. […] All that the man needs, the woman needs. At least we eat, the men also eat. We wear clothes, the men also wear clothes. The men wear shoes, we also have to wear shoes. Yes, so we have to make it equal.[1]

- *Lucila, Nicaraguan coffee producer and cooperative member*

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[1] Translated from Spanish. See Appendix 6 for all original Spanish quotes and English translations used in this study.

Chapter 1. Introduction

Sayra[2], a member of the PROCOCER coffee cooperative, leads me through the coffee and corn fields towards her home in a rural community of northern Nicaragua. Inside, I sit in the smoke-filled kitchen area and chat with Sayra as she prepares *gallo pinto*[3] and *tortillas*, all the while helping her with the futile task of shooing the chickens away from the food. Her three young children and grandchildren run in and out of the kitchen, playing and fighting and bringing their tearful disputes to Sayra to mediate, and she continues to scold and reprimand the children over the adobe walls to the other room. When the food is ready, we gather on the plastic chairs in the living room as Sayra serves dinner to her husband Manolo, the children, and I before finally sitting down with dinner for herself. Even during the meal, she is busy helping the children eat and wiping up spilled food. Manolo and I talk about how difficult it is to be a *campesino* these days, especially with the drought in the region last year, but he says that being part of the cooperative has helped. After we clear away the dishes, Sayra sits at the table with Manolo and tells him about her meeting at PROCOCER and the possibility of applying for a credit loan for their coming harvest. They discuss the different financing options available to them before agreeing that Sayra should go ahead and apply for the credit.

To what extent is gender equity being achieved in her home? In some ways, Sayra's situation is indicative of the changing gender roles from her participation in the cooperative: Sayra and her husband share in the decision-making about the farm and she represents the family in the cooperative rather than her husband, which is relatively uncommon for women in the region. In other ways, her situation demonstrates the changes that still need to occur, as Sayra continues to be primarily responsible for the domestic and childrearing responsibilities in addition to her added productive and community activities. The example of Sayra and Manolo illustrates the complexities of assessing progress in gender equity, a concept that is multidimensional, subjective, and ultimately difficult to measure. This study explores these questions within the context of a project to develop gender equity indicators for the PROCOCER cooperative.

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[2] All names are pseudonyms.
[3] Beans and rice, part of the staple diet for Nicaraguans.

1.1 Research questions and objectives

Women such as Sayra, in Nicaragua and in almost every country worldwide, bear a disproportionate burden of the health disparities (1). The underlying causes of these gendered inequities take root in the social, political, and economic environment in which they live – collectively referred to as the social determinants of health – and the main drivers of disparity between and within communities and countries (2). The majority of small-scale farmers in the South live in precarious conditions that result from the interaction of a number of social determinants, which include the marginalization and isolation of rural communities and the highly inequitable international trade relations that depress the prices for their agricultural products. Gender is one of the most powerful determinants of health, and women's experiences in this sector are particularly pronounced (2). Societal norms around gender roles and entitlement dictate women's position in society and access to resources (3), intersecting with the other determinants to influence inequities within households as well.

In coffee production, the twisted irony of the world's political and economic order condemns small-scale farmers – who provide the bulk of the labor – to shrinking revenues while growing profits are amassed in Northern-owned corporations (4). This thesis study examines Fair Trade (FT) as a social movement and alternative market that challenges many of the determinants that feed the vulnerability and disempowerment of farmers in the South by promoting more equitable and democratic trade relations (5). While much of the literature on FT highlights the positive economic, environmental, and social impacts to producers, the fact that the benefits are being distributed equitably to women and men is often assumed or overlooked. What is not counted often does not count, and the lack of gender-disaggregated data and gendered analyses prevents a thorough examination of gender issues in FT (6). This issue was highlighted in a recent report on FT coffee cooperatives in Nicaragua that identified the need for indicators to measure progress towards gender equity, identify areas where it is not being reached, and increase the visibility of this neglected issue (6).

The purpose of this thesis is to better understand and pose ways to measure gender equity within the context of one FT coffee cooperative in Nicaragua, the *Cooperativa Multisectorial de Productores de Café Orgánico Certificado Las Segovias R.L* (PROCOCER). The recent report by the Commission on the Social Determinants of Health calls for diverse

forms of research to assess how the determinants influence health as well as how interventions might address these determinants (2). As such, in order to better understand how gender equity affects health, gender equity (framed here as the exposure variable in epidemiological analysis) must first be defined before its impact on health (as the outcome variable) can be determined. This investigation will therefore be structured within the conceptual model that FT influences gender equity, which in turn influences health (Figure 1).

| Fair Trade | → | Social determinants of health
Gender equity | → | Health |
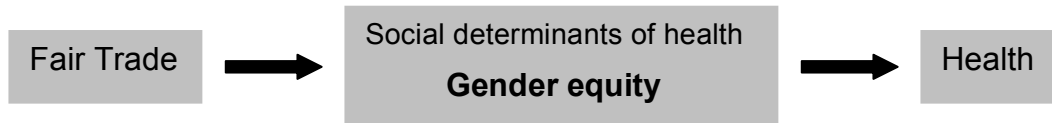
Figure 1. Pathways of Fair Trade, gender equity, and health.

Gender equity is a concept that is deeply embedded in normative values and can only be defined in relation to specific contexts, yet there are few examples in the literature of gender indicators that have been developed with the participation of those whom the indicators aim to measure. The literature on methods in participatory indicator development is critically lacking, and this study also explores the process of integrating participatory approaches with conventional methods of indicator development. This investigation will be guided by two main questions:

1) What indicators best capture gender equity in the cooperative PROCOCER?

2) What can be learned about the process of the participatory development of indicators for a complex social construct such as gender equity?

My thesis research will feed into an ongoing action-research agenda examining FT and its effects on gender equity and health in Nicaragua with a larger research partnership of fourteen researchers, cooperatives, and organizations from Canada, the United States, and Nicaragua (Figure 2). This partnership includes my thesis supervisor, Dr. Lori Hanson from the University of Saskatchewan, the *Movimiento de Mujeres "Flores del Café"* (MMFC), a women's movement within the national Cafénica FT coffee organization, and PROCOCER, my primary organizational partner for this investigation. A recent strategic plan produced by the MMFC proposes organizational indicators to measure progress towards gender equity, and this study will complement this existing set with additional cooperative- and household-level

indicators.
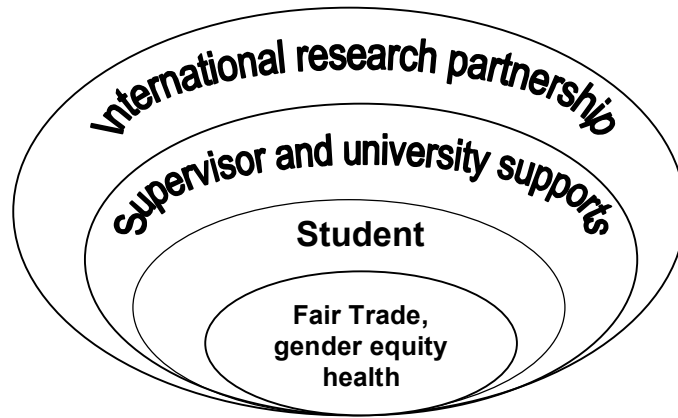
Figure 2. The research partnership model, adapted from Terstappen (7)(p.56).

Chapter 2 will present an overview of the literature on indicator development and gender equity as well as the context of FT in Nicaragua. Chapter 3 will describe the methods used in this investigation, followed by a presentation of the results in Chapter 4, the discussion in Chapter 5, and finally the broader conclusions of this study in Chapter 6.

Chapter 2. Defining the context: literature review

Existing studies on FT, and particularly on the gendered impacts of FT, emphasize the great diversity of conditions, realities, and circumstances in which the producers and producer organizations operate (8,9). Correspondingly, the influences of FT are distinct for the specific producer contexts. The key elements that formulated the research questions for this investigation must first be explored in order to situate this study in its unique context: the evolving position of women in Nicaragua, coffee production, and FT. The need for a means to assess the impacts of FT on women leads to the discussion on gender equity indicators in the literature, the use of Mayoux's Empowerment Framework to lend conceptual structure into an examination of gender issues, and finally, an exploration of existing approaches to participatory indicator development. The investigation into these issues is framed within an examination of gender equity as one of the most pervasive social determinants of health, which is where the discussion will begin.

2.1 Social Determinants of Health

Health is a multidimensional concept defined as a "state of complete physical, mental and social wellbeing, and not merely the absence of disease or infirmity." (10) While biomedical factors and the health sector play a small part in influencing health, the broader environment in which one lives has a greater role in determining health and wellbeing (2). The social determinants of health are defined by Marmot and Friel (11) as "the circumstances in which people are born, grow, live, work and age; and the inequitable distribution of power, money and resources that are drivers of those circumstances of daily life." (p.1095) These determinants include a range of social and community factors, living and working conditions, and socioeconomic, political, and environmental conditions (Figure 3) and there is mounting evidence that health follows a social gradient where health status is directly proportional to socioeconomic position (12). The World Health Organization's Commission on the Social Determinants of Health (2) notes, "it is not an unfortunate cluster of random events, nor differences in individual behaviours, that consistently keep the health of some countries and population groups below others" (p.26); rather, the combination of the social determinants produce the highly uneven health status outcomes observed in the global landscape.
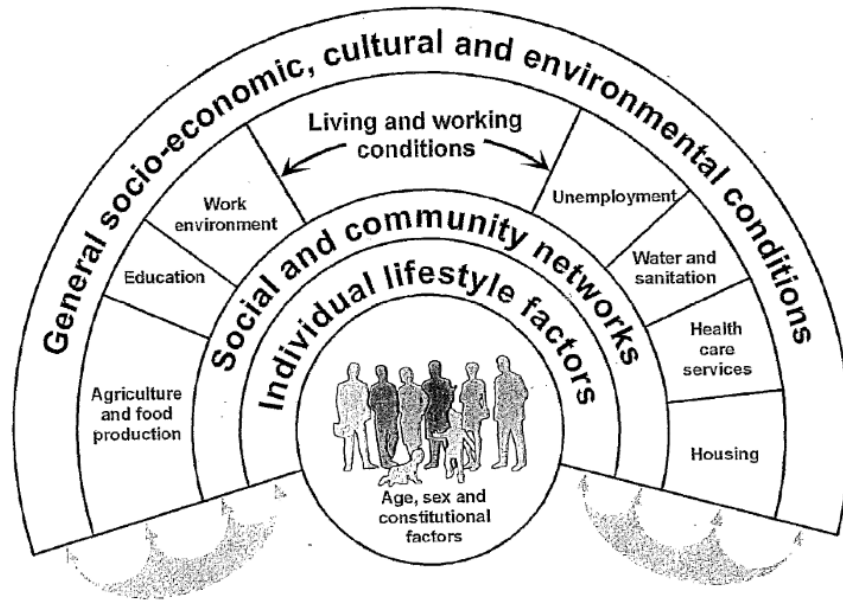
Figure 3. Dahlgren and Whitehead's (13) model of the social determinants of health (p.11).

Unlike the biological factors that determine a person's health, these determinants of health are socially generated and highly actionable (2). The Commission calls for multifaceted approaches to address health inequities – strategies that move beyond health systems to address the broad spectrum of social determinants (2). To achieve this, a broad evidence base is needed to inform action on a wide variety of interventions from different disciplines (11). However, the current literature reflects biases towards descriptive, epidemiological studies that tend to focus on modifying lifestyle factors (12). This study will contribute to the need for diverse evidence and interventions by examining FT as an intervention on the upstream determinants of health that seeks to challenge existing economic, political and social forces in the current of globalization. Specifically, gender equity will be explored as a powerful upstream determinant that affects how and to what extent the proximal determinants of health are experienced by women in FT.

2.1.1 Gender Equity

Discussions on gender equity must first distinguish between the concepts of sex and gender. Sex refers to the biological distinctions that define women and men, while gender is an evolving construct based on the different roles and positions assigned to women and men in

society (14). Vlassoff (15) writes that, "while men and women are physically and physiologically different the differences between them are natural and unavoidable and should not translate into status and power inequalities." (p.1714) In reality, however, these differences do indeed create inequities. Worldwide, women generally have less access to material (ie. land, wealth, property) and non-material (ie. education, health care, decision-making power) resources, as patriarchal power relationships between women and men are expressed in the gendered entitlements to rights and resources (2). Moreover, while most of men's work is valued through monetary compensation or indirectly through status and political power, women's work is often perceived as an expected responsibility and unpaid (16). Nonetheless, as social values around gender norms change over time, place, and life stage, gender inequities can also shift, advance, and regress (2,14,17).

The nature of gender relations affects how women and men access resources, the rights they can exercise, and the health status they experience (14). Gender equity in health signifies the elimination of "unnecessary, avoidable and unjust health inequities which exist as a result of the social construction of gender." (18) The relationship between gender equity and health is rooted in the multiple and central roles women hold in society: in addition to women's vital reproductive, productive and community responsibilities – the "triple role" (3)(p.iii) – they also act as the ultimate form of social safety net for their families, economies and societies in times of crisis where social security has failed (3,14,19). Women's reproductive role as the primary caregivers of children, the elderly, and the sick ensures the survival, reproduction and security of society (2). For that reason, the health of both women and men are dependent on the position of women in society (2), and the health effects of gender inequities affect both women and men (17). That gender interacts with other social determinants such as ethnicity, class, and sexuality in producing inequities contributes to the difficulties in understanding the mechanisms through which gender affects health outcomes (14).

It is important to distinguish between the concepts gender *equality* and gender *equity*. In health, gender equality refers to "achieving equal health outcomes between women and men, which may not be possible owing to inherent biological differences" (1)(p.440), and actions to improve equality can include policies that prohibit discrimination based on sex. In contrast, gender equity looks to "reduce avoidable differences between women and men in opportunities

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to survive and enjoy good health, and to aim for equal access to health services for equal need and enhancing resources for unequal need…" (1)(p.440) Equity seeks to address the historical and social disadvantages that prevent women and men from living as equals (20). As such, equity does not entail that women become the same as men; rather, it means that access to rights are not dependent on or constrained by one's sex and reflect the different needs and aspirations of women and men (20-22). Equity requires a re-conceptualization of health and wellbeing that is inherently different but equal for women and men. Initiatives to improve equity include affirmative action policies and differentiated women's services in health care.

Where and how women participate and benefit in interventions is dictated by the unequal power relationships between women and men (3,23). Interventions that do not recognize differences between women and men risk further marginalizing women and exacerbating existing conditions (23). The development literature distinguishes between the practical interests and strategic interests of intended beneficiaries, two interlinked concepts that stem from the different roles of women and men in society (3,16,24). Practical interests describe the immediate and material conditions necessary for human survival; for example, income-generating initiatives and housing programs to improve the physical living conditions of women (3,16). Strategic interests envision long-term change, addressing the subordination of women in relation to men with the aim of increasing women's control over their resources. Initiatives include educational programs for women, freedom of choice over childbearing, and promoting women's participation in decision-making spaces, among many others (3).

Although both practical and strategic interests are necessary for attaining gender equity, health and development interventions have largely addressed the former, as most organizations and governments are reluctant to challenge the status quo of patriarchal relations that is inherent to addressing women's strategic interests (16). Parpart (25) writes,

> [b]asic assumptions about women and men, the accepted sexual division
> of labor, and traditions that bind women into subordinate positions are
> seen as sacred areas that must be left alone. They are reified as culture,
> and therefore placed outside the development mandate. (p.228)

That transforming gender relations constitutes unwarranted cultural interference is often propelled by dominant and patriarchal figures in society (26,27), a view that is widely challenged by feminist scholars and activists. Mehta argues that all challenges to root causes of

disparity generate conflict, but that value judgments are made as to which issues are acceptable to address in development projects (27). For example, challenging class inequities is often readily promoted while gender inequities are seen as untouchable social norms (27). Furthermore, cultural values are constantly shifting and being reinterpreted in response to changing needs and conditions (28). Claims that Northern values are being imposed on Southern countries in efforts to challenge gender inequities ultimately deny the existence and agency of the local individuals, organizations and governments that have been working towards that change (28).

      Coffee production in Nicaragua provides a particularly interesting context within which to examines these issues, as the gendered economic, political and social forces often render women invisible from the benefits despite their longstanding participation in this field. The voices of the women producers are demanding to be heard, challenging the patriarchal structures of what has been traditionally viewed as a masculine domain. This study is a response to ongoing struggles and activism for equity and justice.

2.2 The Nicaraguan context

Figure 4. Map of Nicaragua (34).

Nicaragua (Figure 4) bears the cumulative effects of a complex legacy of occupation by Spain, the United Kingdom, and the United States, followed by more than four decades of various forms of aid intervention from international governments and organizations. With a population of just under six million spread over diverse and often isolated rural communities (29), Nicaragua is second only to Haiti in poverty rankings in the Americas, with 46% of its population living below the poverty line (30)[4], a third of its rural population without functional literacy (31), almost quarter of its population without access to clean water (32). It ranks 115th out of 169 countries on the Human Development Index[5] and 97th out of 169 countries on the Gender Inequality Index[5] in 2010 (33). The current conditions in Nicaragua cannot be understood in the absence of its political, social and economic context; what follows is a brief overview of its recent history.

2.2.1 Revolution and beyond

In the 19th and 20th centuries, the promotion of export commodities such as cotton, sugar and coffee intensified, and agricultural production was increasingly concentrated into the hands of large-scale producers (35). A large proportion of small-scale farming families were displaced from their fertile lands, resulting in the widespread exploitation of their cheap labor (36). Forty years of a corrupt dictatorship by the Somoza family further accelerated social unrest (35,36), creating the conditions for the popular uprising of the *Frente Sandinista de Liberación Nacional* (FSLN) that eventually overthrew the Somoza regime in 1979. The leftist government instituted sweeping reforms to redistribute resources and increase access to essential services for the most marginalized populations, including isolated rural communities (37). In addition to revolutionizing the most fundamental determinants of health (ie. increasing literacy rates and improving sanitation in rural areas), the health care system was restructured based on the primary health care model that increased access from 30% to 70% of the population (37,38).

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[4] Based on the aggregated consumption method that calculates the minimum cost for basic human needs, which is set as the "poverty line." (30)
[5] See Section 2.4.1 for an explanation of its calculation.

Agrarian reform had a central role in the FSLN's economic and political agenda, as "access to land is the main determinant of well-being in rural communities." (39)(p.44) With the passing of the Agrarian Reform Law in 1981, the state confiscated abandoned and under-used land (many of which belonged to the Somoza family and wealthy landowners who fled the country) for redistribution to the landless and land-poor (36). As male heads of households were generally recognized to administer the family's resources, 90.5% of these land titles were assigned to men (40).

The US-funded war of the *Contras* against the revolutionary government in the mid-1980's undermined many of the progressive initiatives, leading to the eventual electoral defeat of the FSLN and the entry of successive conservative parties to government (38). In the face of crippling foreign debt and stringent Structural Adjustment Programs (SAPs)[6], the government decreased public spending and increased privatization and trade liberalization (38,41). User fees were introduced for health and education (38), rural poverty increased (41), and the health gains achieved by the FSLN were drastically diminished (37,38). Although the FSLN was re-elected in 2006 under the leadership of Daniel Ortega, the party has lost its revolutionary demeanor: government initiatives to alleviate poverty and health care reforms have been overshadowed by the political maneuverings of a leader who "has walked a tightrope between democracy and autocracy." (42)(p.157) Closer ties with the Catholic Church have put the government directly in opposition of efforts to address women's interests (43), the implications of which remain to be seen.

2.2.2 The women's movement in Nicaragua

Women's roles have undergone enormous change over the last half century, and this has both influenced and been influenced by Nicaragua's complex social and political history. Isbester (44) describes that, prior to the 1960's,

> …the roles available to Nicaraguan women were typical for a poor Latin American nation: upper-class women were trophy wives with servants to do the household tasks, while poor women both worked outside the home and raised their children–frequently with heartrending suffering. Women's

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[6] Austerity measures imposed by the International Monetary Fund and the World Bank to finance debt repayments.

economic and social contributions went unrecognized, regardless of their class. (p.23)

Though the birth of the feminist movement in the country is often attributed to the Sandinista revolution, Whisnant (45) argues that, "the six-year Sandino campaign was a brief episode compared to the six decades or so of active, organized struggle that Nicaraguan women had maintained by the early 1960's." (p.416) The revolution did, however, provide the space for women to organize and participate in public and political spheres through the first women's organization in the country, AMPRONAC, which was later re-named AMNLAE (24,43,46). The social reforms of the revolutionary government both benefited women and facilitated their increased participation in the community and labor force (47), while legal and constitutional reforms officially eliminated sexual discrimination (48).

The Sandinista government's reluctance to challenge the patriarchal structures that impeded gender equity from moving forward (48) led to the emergence of autonomous feminist groups that were restructured around horizontal networks (43,44). As the conservative governments of the 1990's rescinded many of the progressive policies for women and sought to reclaim traditional gender roles (43,45,47), the women's movement continued to flourish, "emerging as one of the most dynamic and diverse social movements in Nicaragua." (47)(p.83) The women's movement increasingly "globalized" with greater involvement in international organizations and integration into the Latin American women's movement (44). Despite the gains made by the movement, the struggle for women's control over resources and their bodies – particularly issues of domestic violence and reproductive rights – continues to be highly divisive and politicized issues in Nicaragua, as seen with the abolition of therapeutic abortion in 2006 (43,49).

Feminism in Nicaragua, as in any country, has diverse meanings and intersects with a multitude of other factors with which women identify, such as race, class, and sexual orientation (44,50). Lambert (50) writes that these changing identities in the continuum of Nicaraguan feminism highlight "the ways in which women become active agents of their own empowerment." (p.41) Calls for greater gender equity and attention to women's concerns within FT and coffee cooperatives are being staged from this historic context of women's organizing.

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2.2.3 The cooperative movement

Throughout the political vacillations in Nicaragua, the influence of the revolution nevertheless continues to resonate in rural communities, particularly with the continued importance and proliferation of cooperatives. The international cooperative movement defines a cooperative as "an autonomous association of persons united voluntarily to meet their common economic, social, and cultural needs and aspirations through a jointly-owned and democratically-controlled enterprise." (51) In Nicaragua, Augusto Cesar Sandino, the revolutionary hero who inspired the FSLN party, helped form the first agricultural cooperatives in 1933 (52,53). These early efforts were dismantled with the assassination of Sandino by Somozan guards (44), but Sandino's ideas would be re-vitalized by the FSLN. The Sandinista government viewed cooperatives as a practical and ideological solution to facilitate the administration of services to rural areas, improve agricultural production, and as an organizing tool to promote community and social support (36). In 1981, the first Cooperative Law was passed and the government provided various incentives such as low-interest credit, technical assistance, and priority for land titles. Diverse types of cooperatives were formed, from cooperatives that only provided joint credit to its members to others where the members collectively farmed a plot of land (36,48,53,54).

By 1989, cooperatives farmed an estimated 20% of the arable land in the country (39,53), although some cooperatives failed economically or fell apart when credit assistance by the government decreased (36). While legal and policy mechanisms explicitly prohibited discrimination on the basis of sex to ensure women's access to these resources, there was little change in practice (48,54). The proportion of women members in cooperatives varied greatly, but they were generally very low (ie. 6% in 1982) and the numbers were even more dismal for management positions and women's participation in technical and organizational training (48). The barriers to their participation are largely attributed to three reasons: the lack of access to productive resources (especially land), discrimination by the male members of the cooperative, and the lack of time to participate due to the women's domestic responsibilities (48,54,55). In some cases, all-women cooperatives formed where the woman members could not join the mixed cooperatives; these were, however, very small in number (48,54).

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Cooperatives provide a means for the community to organize against insecurity and increase access to material and social resources (39). In the face of the neo-liberal governments' cuts to public assistance for small- and medium-scale agricultural farmers in the 1990s, farmer organizations such as cooperatives enabled many these farmers to survive this period (56). In the face of a receding government and low coffee prices, coffee cooperatives that have sought alternative trade markets and support from international NGOs managed to survive (57) and have increasingly stepped in to fill the void left by the withdrawal of state support in providing credit, training, and even public services (58). In addition to the practical benefits of income generation, risk sharing, access to information and reduction of transaction costs (39), cooperatives also contribute to consciousness raising, raising self-esteem and confidence, and providing social capital and support in the process of empowerment (53,56).

For women, cooperatives have the potential to develop greater solidarity and support to collectively recognize and confront gender inequities (59). Although cooperatives are frequently promoted as an effective strategy to tackle poverty and empower rural women in developing countries, Mayoux warns that cooperatives can only have a limited impact on gender unless specific attention is dedicated to addressing feminist concerns (59). For example, land ownership continues to be a central obstacle to women's involvement in cooperatives, as women held only 22% of the land titles in 2003 (60). The blind spot towards these structural impediments continues to marginalize women engaged in agricultural endeavors, and none so much as in the coffee economy.

2.2.4 The coffee economy in Nicaragua

On a global scale, coffee is a 25 billion dollar industry (61)[7] and provides a livelihood to 25 million coffee-producing families worldwide (4). But the coffee industry, propelled by the forces of globalization, also exemplifies the deplorable inequities between countries of the global North and South. The most labor-intensive work and the largest proportion of human resources are dedicated to the agricultural farming of the coffee beans in Southern countries, yet the majority of the profits are accrued in the North by large multinational companies that process, package and market the beans for sale. Monopoly control by a few trading giants

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[7] The value of exports of coffee and coffee substitutes in 2009.

enables these companies to retain increasing profits while farmers are left with an ever shrinking share of the price (4,62); current estimates calculate that producers receive only 10% of the final price of coffee (63).

Since coffee was introduced in Nicaragua in the late 19th century (35), it has played a pivotal role in the economy of Nicaragua, currently making up approximately 25% of the total agricultural exports of the country (64) and contributing over 182 million US dollars to the national economy in 2009 (65). Of the 43,100 coffee producers in the country (64), two-thirds are small-scale producers[8] where the primary source of labor is the family (66). The disparities of the coffee industry exist within the country as well, as dominant social classes within the country have greater economic power in the commodity chain (4). Only 6% of coffee farmers own 42% of the land used for coffee cultivation (57) while small-scale producers have less access to low-interest credit than their medium- and large-scale counterparts (64). Coffee is a boom-and-bust commodity that is characterized by cyclical periods of fluctuating prices (4), leaving small-scale producers vulnerable to the volatility of world market prices. In 2001, the international coffee crisis brought the real prices of green coffee to its lowest point in history (57) and, coupled with the neo-liberal policies in Nicaragua, has had devastating economic and social consequences for small-scale farmers. Many conventional coffee producers were forced to sell their beans below the cost of production, which resulted in widespread out-migration in search of employment, food security emergencies, decreased household expenditures on health care and education, and increased domestic abuse (57,67). Moreover, Nicaragua is a country that is prone to natural disasters such as hurricanes and drought, which often threaten the harvest and further push small-scale coffee farmers into meager and tenuous livelihoods with few opportunities to enact change in their lives: "the cumulative effect of all this continuing year after year, and of having to submit your life entirely to the whims of world coffee prices, is what powerlessness means." (63)(p.46-47)

2.3 Fair Trade

Amidst this perverse reality, FT advocates for "trade not aid" (68)(p.411) to "address the imbalance of power in trading relationships, unstable markets and the injustices of conventional

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[8] Producers with less than 20 *manzanas* (about 14 hectares) of land (64).

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trade." (69) The current FT system is the progeny of a sixty-year movement that began with church-based initiatives in North American and European countries to sell handicrafts traded directly with Southern artisans to return greater profits to the producers (70). As an alternative trade model, FT has the potential to promote a more equitable distribution of wealth and also closer relationships between Northern consumers and Southern producers based on fairness, respect, and solidarity (71). FT has also been framed as a development strategy, where it aims to strengthen communities and promote self-sufficiency from the ground up (4,9), as well as a system of standards governing trade relations (72). Sales of FT products worldwide continue to grow annually, with a 15% increase in 2009 (73). A growing number of products are being FT certified, including tea, cocoa, and bananas, with coffee being the most highly traded FT product (70).

Fairtrade International[9] (FLO) certifies the majority of FT products in Nicaragua.[10] It offers "fairer" terms of trade through standards that guarantee a minimum stable price for producers, facilitates longer term trade partnerships with buyers, and provides pre-financing for producers (74). The minimum price paid through FT at the time of writing is $1.20 per pound of green coffee beans (75). The producers must abide by the minimum labor requirements for hired laborers according to the International Labor Organization regulations while only small, family-based producers organized into cooperatives or other democratic associations can obtain FT certification (76), a requirement that extends the goals of FT beyond economic empowerment to fostering social and political development with democracy and transparency. An additional social premium on top of the price of coffee is dedicated towards development projects for the producer communities, currently set at 10 cents per pound of green coffee (69,75). Decisions upon its investment must be democratically and transparently made by producer organizations (76). The standards include minimum agro-ecological requirements to promote environmentally sustainable farming methods, though these are far less stringent than organic certification standards (76). Producers who are certified FT and organic receive a specified bonus (an additional 20 cents per pound) (75); about half of coffee exports from Latin

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[9] Formerly Fair Trade Labelling Organizations International.

[10] While a growing number of organizations and buyers are fostering direct trading relationships with Southern producers outside of the FT network, this study focuses on producers and organizations in the FLO-certified FT system.

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America are dually certified (70).

The FT model has generated a great deal of research to assess its impact on producers and FT organizations.[11] Framed through the determinants of health, Terstappen's study finds that FT has both direct and indirect impacts on the health of producers, which include income, environmental, and psychosocial benefits (7). In the literature, studies most commonly report the direct benefit of increased incomes (8); nonetheless, there is increasing recognition that the non-income impacts of FT are as important as the monetary benefits (8,77). The indirect ripple effects of the higher incomes contribute to increased food security (78,79), decreased out-migration (80), decreased risk of bankruptcy (67), expansion of producer coffee harvests (78) and land holdings (58), as well as increased expenditures on education, health, and housing (78). Producers and their communities also have more stable and secure employment, increased access to credit (58), pre-financing, and technical assistance (57,78-80), as well as improved health from reduced agrochemical use (7,8). Nelson and Pound's review finds strong support for positive empowerment impacts on producers, with evidence of increased self-confidence, improved market and export knowledge, and greater access to training (8). The producers of Terstappen's study describe a greater sense of control, social support, and solidarity as having importance influences on health (7), while Bacon's study reports on the collective empowerment of the producers (81). Importantly, Nelson and Pound note the difficulties in drawing general conclusions from the evidence base as different dimensions of empowerment were examined in the diverse studies (8).

The evolving model of FT, however, is not without its growing pains. One of the biggest issues facing FT is insufficient demand from Northern markets, with FT coffee farmers producing an estimated seven times the actual volumes exported through FT channels (82). As cooperatives are left with selling the remaining coffee to the conventional market at far lower prices (82), the higher FT price therefore serves only as a partial subsidy to the producers despite the additional time and financial inputs for FT and organic production (66,80,82). Furthermore, while FT prices are higher than that of the traditional market, they are still far from being truly "fair" with respect to the time and resources invested by the farmers or in

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[11] This discussion is only meant to provide a brief overview of the impact studies on FT producers. For more comprehensive reviews, see Le Mare (90), Nelson and Pound (8), and Elder (77).

providing a living wage (6,8,78). That FT-organic prices have not increased in 10 years means there has been a decrease in actual prices when adjusted for inflation (83). Finally, the current FT system alone is not a panacea for the economic and development problems of marginalized areas. FT favors producers who already have a certain level of prerequisite support, knowledge, money, organization, and potential viability (7,84) and may be excluding the most vulnerable populations. For example, FT does not address the needs of those without access to land (67,80). This may in fact be amplifying existing inequities within communities, calling into question the ability of the existing FT model to transform local and international dynamics, as with issues of gender.

2.3.1 Gender equity and Fair Trade

In Terstappen's study, a woman producer argued that if women are producing and selling FT coffee while being dominated and mistreated by men, the coffee cannot be marketed as "fair." (7)(p.78) Coffee production is traditionally seen as men's domain, yet women have always labored in the fields alongside the men (60,85). This perception is compounded by the fact that women's contribution to agricultural labor is often not counted as productive work (40,40,44,84) and is hidden under the guise of family labor. As land titles are most often in the name of the patriarchal figures in the household, men are typically the ones to seek cooperative membership to represent the interests of the family (68). FT relies primarily on the "generic family farmer" in the cultivation of coffee, even though the division of labor is highly gendered (78) and there is evidence that women perform a greater share of the added quality-producing tasks associated with FT and organic certification requirements (83). Furthermore, women's tasks tend to be more labor-intensive in the cultivation and collection of the coffee while they only minimally participate in the value-added activities of processing and commercialization (6,78,83). While the benefits are implicitly assumed to "trickle-down" to other members of the household, the resources are subject to the same gendered notions of entitlement and control that marginalize women (86). The increasing number of women-only FT coffee organizations such as *Las Hermanas* and *Fundación Entre Mujeres* in Nicaragua is a trend that suggests the present FT system is not adequately protecting and promoting gender equity within the cooperatives (6,87).

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The FLO standards (76) only make reference to the specific interests of women in Section 1.4.2.1 pertaining to Non-Discrimination: "special attention should be given to the participation of female members." (p.10) FLO suggests that the social premium, a portion of the coffee price that funds community development projects, be used towards the empowerment of specific groups, in which women are included as just one of these groups (88)(p.10). Interestingly, the "Empowerment of Women" had been listed as one of the impact areas of FT in 2009 (83,89), but this page has since been removed from the FLO website and the theme of women's empowerment cannot be located in any of the other pages. Gender issues are hidden under the umbrella term of discrimination in the FLO standards (86), and there is a growing call for FT organizations to be more proactive in advancing gender equity (90). Lyon (87) argues that gender equity needs to be a vital component of the FT mission or else it will risk worsening conditions for rural women (p.266).

Despite the myriad of studies evaluating the impacts of FT on producers, the findings are infrequently disaggregated by sex or only include a general and superficial analysis of gender (8). However, the majority of these studies recognize that women do not participate in and benefit from the FT system in the same way that their male counterparts do (90). A small but growing area of the literature is investigating the independent impacts of FT on women's empowerment and gender equity (7,72,81,83,86,87,91). The most common indicators of gender equality point to the low female membership and the virtual lack of women in decision-making spaces of the cooperative (57,67,80,82,84,90). FLO's developing Monitoring and Evaluation system includes the participation of women as one of the twelve indicators to measure the benefits and outcomes of FT on producer organizations, and estimates that women represent 35% of the hired workers and one fifth of the total membership of all certified producer organizations (92). A recent report in Nicaragua commissioned by FLO Central America (6) finds that approximately 25% of cooperative membership of the FT organizations studied is comprised of women, with women's participation rates in individual cooperatives ranging from 4 to 40%. It also reports abysmal participation rates in leadership positions and, where women are in organizing positions, they more often occupy administrative rather than the higher positions (87,93). While these descriptive studies predominantly conclude that cooperatives are still far from achieving gender equity, Lyon (83) notes that women's participation in FT-organic

coffee production is increasing. Elder's quantitative study (77) finds that FT is strongly associated with the perception that women participate more among both men and women respondents, though it cautions against conclusions of causation. Despite the focus on participation, increasing the numbers of women in cooperatives does not necessarily translate into changing gender roles (90), just as economic empowerment cannot be assumed to directly increase other dimensions of empowerment (94). Several authors question whether greater participation of women represents the empowerment of women or whether it is merely a sign of the trend towards the feminization of agriculture, where women are left with low-paying farm labor as men out-migrate to find better-paying jobs (83,94).

Empowerment is a central component of FT, however, the literature does not provide any definitive indication of how and to what extent FT influences women's empowerment. One study gives evidence of women experiencing "a certain degree of empowerment" (67)(p.595), while another documents "uneven gendered empowerment processes." (81)(p.59) That empowerment is not well defined in the majority of these studies enhances the difficulty in identifying causative relationships with FT. In most cases, women's participation as members of FT organizations have contributed to their increased access to credit as well as education and health services that would otherwise have been unavailable (72). Some of the organizations described have formed women's groups for income-generating projects such as coffee tours, weaving groups (87), and local bakeries (8) to increase the opportunities for women to access markets and enhance their technical and productive knowledge.

Additional to these material benefits, there is evidence that women participating in FT experience increased self-esteem and self-confidence (67,86), a greater sense of security (67), greater access to support networks (95), increased management capabilities (67), and are engaged in a process of consciousness-raising around women's rights (95). It is unclear how FT affects household and community dynamics, and evidence of FT's influence on gender roles is anecdotal at best and often contradictory. A few of the cases suggest that through earning independent incomes, women have greater control over their financial resources in the home (87,95,96), although Nelson and Pound's review (8) finds that more often women have little access to or control over the income from the sale of the crops. Other studies describe increased status in the home and community (91) and a greater share of household decision-making

(91,95), however, Utting-Chamorro's study (67) on FT coffee in Nicaragua finds that *machismo*[12] still has a strong influence in communities and that men continue to dominate household decisions. Although one study (98) reported men's increased participation in the domestic housework and lower cases of women being abused in the community (p.136)[13], the literature overwhelmingly finds that the gender roles are largely unaffected (84,86,87,95) and that women are faced with the extra burden of productive responsibilities in addition to their regular household duties (8).

These inconsistent findings speak to the difficulties in assessing gender equity given the great diversity of study contexts as well as the lack of a coherent definition of equity. The evidence presented in these studies is predominantly descriptive in nature, which limits the extent of our understanding of whether FT challenges gender inequities or whether it merely reinforces existing realities (8). A set of indicators to measure gender equity is one tool that can address this shortcoming, which will serve to both define the dimensions of empowerment and provide a means to evaluate the influence of FT.

Finally, it is important to emphasize that FT is just one element in the story of the producers' lives and is subject to the same local traditions, cultures, and hierarchies. Murray et al. (82) point out that gender inequality is not a result of women's participation in FT but rather the traditional culture in which FT operates. The sociocultural barriers that most Latin American women face (including unequal opportunities to own land, the burden of domestic and reproductive responsibilities, and the lack of capital and knowledge to invest in coffee production) are major factors that limit their participation in FT (71,83,91,95). Nonetheless, Hutchens (86) argues that these issues cannot be accepted as cultural untouchables; rather, they must be reframed as rights-based and structural issues through policy or institutional mechanisms:

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[12] Defined as "a strong or exaggerated sense of manliness; an assumptive attitude that virility, courage, strength, and entitlement to dominate are attributes or concomitants of masculinity." (97)

[13] Indicators of violence against women require careful consideration, as decreasing numbers of reported cases may not represent decreased violence but actually that fewer women who experience violence are reporting the offense. Violence indicators often view an increase in reported cases as positive change, as it signifies that an increased number of women are becoming aware of their rights and reporting cases violence (99). The latter conceptualization may be more appropriate to the context of Nicaragua, where violence against women is often viewed as a private family matter (49).

'Empowering' women requires challenging women's subordinate position in society and seeking to change the existing structures of class, gender and race (or other factors) that shape women's experiences and opportunities in *any* culture. (p.461)

This quotation is also a reminder that gender issues must be further contextualized by the additional identities with which women associate. Several researchers on gender and coffee production describe the intersections of ethnicity, class, marital status (85,87) and – particularly in the context of Nicaragua – political loyalties in influencing women's participation. These diversities give rise to a corresponding expansion of perceptions, values, visions, and approaches to addressing gender issues, differences that have been particularly salient in efforts to improve gender equity in FT in Nicaragua.

2.3.2 Gender equity in Nicaragua's Fair Trade coffee network

While Taylor (80) and Le Mare (90) posit that cooperatives are confronting the issue of gender equity in response to external pressure from international buyers and the FT movement, Hanson and Terstappen (7) criticize this perception for negating the agency of local organizations working towards change. In Nicaragua, the *Fundación Entre Mujeres* (la FEM), a feminist NGO, perceived a disconnect between the existing FT model and its capacity to address gender issues despite its official rhetoric. This initiated the early processes of an action-research agenda on FT, gender equity, and health, leading to the research partnership that formulated this study.

Additional to the work of the FEM, the impetus for greater gender equity in FT is particularly active in Nicaragua, with much of this work stemming from Cafénica, the largest network of small-scale coffee producer cooperatives in the country. Cafénica functions as an umbrella organization for 12 cooperative organizations and represents 9,118 (41%) of the small-scale coffee producers in the country and 19% of the national production of coffee (93). In 2006, half of its coffee production was dedicated to FT, high-quality, or other gourmet coffee markets (58), with the remaining sold on conventional markets. A women's movement, MMFC, was formed within Cafénica in 2006 to advance the gender agenda within the member organizations. The MMFC aims to make visible the contribution of women producers and

coproducers[14] in coffee production chain, promote and harmonize the processes for gender equity, diminish gender inequalities, build capacity, and empower women (100). MMFC's membership aims to reach the estimated 18,000 women and coproducers of the associated organizations of Cafénica, however, awareness of this new organization is generally low and the annual meetings have been attended by around 100 to 200 members (María Asunción Meza Rojas, personal communication, March 2010). It is important to note that the horizontal organization of Cafénica respects the autonomy of its member cooperatives, and as such MMFC can only offer recommendations, guidance, and resources to the member organizations and does not have the mechanisms to enforce compliance among its members. Moreover, the reach and scope of MMFC's activities are dependent on approval by Cafénica and funding (which they receive from both Cafénica and international organizations) (María Asunción Meza Rojas, personal communication, March 2010).

The recently published MMFC Strategy for the Economic, Political and Social Strengthening for 2009-2013 presents a range of organizational indicators to assess and direct their future actions (100). Proposed initiatives include consciousness-raising campaigns to promote women's access to land, encouraging cooperatives to revise their organizational statutes, rules, policies and strategies to deconstruct gender inequities, developing the leadership capabilities of women in the Cafénica organizations, and supporting the activities of member organizations towards the development of specific strategies and policies to improve gender equity (100). While a few of the indicators measure gender equity at the cooperative level[15], the majority pertains to the organizational strengthening and strategy of the MMFC (100).

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[14] Coproducers are defined as the wives, partners, and daughters of FT cooperative members who produce coffee, carry out the domestic work, and participate in the production process without remuneration or acknowledgement of their contributions to the family, cooperative, local and national economies (100).
[15] Examples include Indicator 7.2.5: By 2011, in at least 70% of the integrated organizations of Cafénica, 60% of the scholarships have been proportioned to women; Indicator 7.2.8: By 2013, the women occupy five decision making spaces in each of the base organizations integrated into Cafénica.

2.3.3 The PROCOCER cooperative
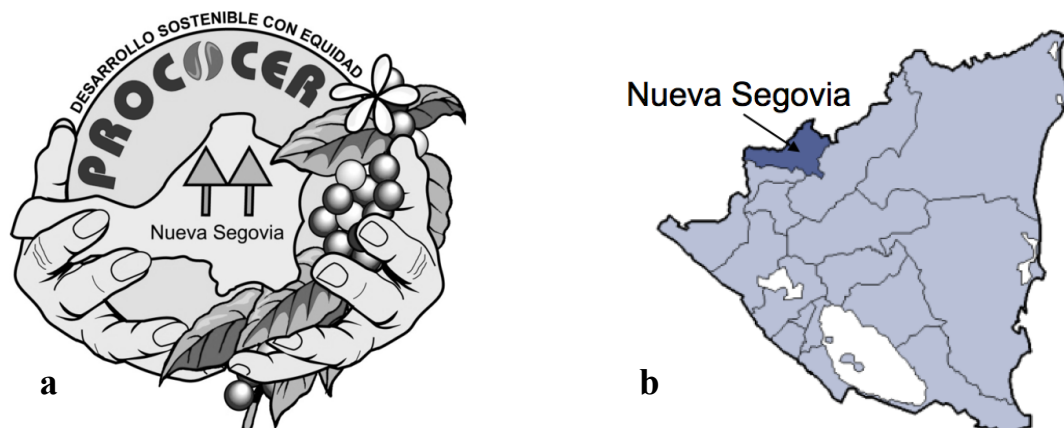
Figure 5. (a) PROCOCER (101)(p.1). (b) Location of Nueva Segovia (102).

The PROCOCER base cooperative (or first-level cooperative) is a member organization of Cafénica and MMFC and the main research partner of this investigation (Figure 5a). Founded in 1999 by 12 women and 138 men, PROCOCER's membership has since grown to 657 at the time of the study, 157 of which are women (Denis Blandón Córdoba, personal communication, March 2010). The main office is in the town of El Jícaro, with the membership spread out in 71 communities of the 4 municipalities El Jícaro, Jalapa, Murra, and Cuidad Antigua in the northern department of Nueva Segovia (Figure 5b), bordering Honduras. The member communities represent diverse political, economic, and environmental conditions, and many are geographically isolated – characteristics that create distinct challenges to cooperative organization. The Mission of PROCOCER is to,

> Strengthen organizationally and financially, raising the productive yields
> and ensuring quality to satisfy the demands of the specialty markets and
> for the improvement of the price of coffee. Diversifying the productive
> and economic activities, improving the wellbeing of member families, in
> harmony with the environment and with just and equitable relations.
> (101)(p.9)

As its Mission demonstrates, the principle purpose of the cooperative is economic in nature, although PROCOCER also aims to address social and environmental areas in its work. All of the coffee produced by the cooperative is certified shade-grown organic by BioLatina and has been FT certified by FLO since 2006, although only a portion of its coffee is sold to FT

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channels. While 548 of PROCOCER's membership constitutes small-scale coffee producers (Denis Blandón Córdoba, personal communication, March 2010), as a multisectoral cooperative, other members are supported by the cooperative in the production of corn, beans, cocoa, vegetables, livestock, *pulperías* (corner stores), and handicrafts. The various products commercialized through PROCOCER contribute to the difficulties in attributing producer impacts solely to FT coffee production.

The main services PROCOCER provides to its members are the commercialization of their products, access to low-interest credit, technical assistance, and training workshops in themes that have included agricultural production, financial literacy, and personal development. Beyond the primary economic functions of the cooperative, PROCOCER also provides other social services to its members, member families, and member communities. These initiatives include a scholarship program for the members and member families, a social promotion program where workshops are "replicated" by volunteer social promoters in their communities (also known as the Train-the-Trainer model of education), community development projects funded by the social premium such as providing school supplies for children and funding *casas maternas* (maternity waiting homes). Additionally, many of the services provided by PROCOCER staff are often addressed on a case-by-case basis, as with the cooperative's revolving fund that provides interest-free loans to members in emergency situations. However, the cooperative's operations are limited by strained financial circumstances and organizational debt, and many of the services and projects can only be offered through joint or full funding by a number of national and international organizations.

As a base cooperative, PROCOCER stores and transports the coffee of its members, but the processing and commercialization of the coffee is largely done by CECOCAFEN, a central (or tertiary-level) cooperative. CECOCAFEN is the principal source of funding and the channel for commercializing their coffee to specialty coffee markets, including FT markets. Additionally, PROCOCER initiated their own brand of coffee for national markets in 2006, *El Doradito*, contributing to the economic diversification and capacity of the cooperative. PROCOCER has played an active role in developing coffee networks in Nicaragua, and was one of the founding members of Cafénica and the Las Segovias Coffee Network.

Democratic organization is an intrinsic value to PROCOCER, and the cooperative has

an elaborate organizational structure to ensure the efficient functioning and administration of cooperative operations. The Board of Directors, Supervisory Committee, and other Committees are elected by the cooperative membership in the annual General Assembly. Moreover, every 10 members are organized into *Comités de Trabajo Territorial* (CTT), territorial work committees that facilitate the representation of and communication with each of its members. A delegate is elected for each CTT, liaising between the members, technical advisors, and the cooperative leadership. The internal system of control to ensure compliance with certification standards include the *Comités de Decisión Municipal* (CDM), committees with 52 internal inspectors, who are trained cooperative members. The paid personnel of the cooperative include a manager from CECOCAFEN, staff from the Administrative-Finance Department, Technical Assistance, *catadores* (coffee tasters for quality control), and staff working in cleaning, security, and the storage facilities. A gender specialist has recently been contracted to work specifically with the women members of the cooperative.

2.3.3.1 Gender equity in PROCOCER

PROCOCER's official motto "Sustainable development with equity" and Mission Statement reveal a commitment to increasing the participation of women in the cooperative. Indeed, the 2008-2010 Strategic Plan (101) includes gender equity in its Vision, Principles, and Values, and an indicator pertaining specifically to women members in Objective 2.2: "To grow in 120 new members of which 40 are women." (p.18) Furthermore, Article 8.j. of the Revised Statues (103) state the cooperative objective "to motivate the permanent participation of women, in all the activities and leadership positions of the business, and equity in work and decision-making." (p.4) In 2006, a proposal for a gender equity strategy for PROCOCER was produced by the Netherlands Development Organization (SNV), providing an extensive list of recommendations for actions to improve gender equity in the four main areas of cooperative operations: Financing, Commercialization, Production Support, and Organization and Administration (104). Since then, PROCOCER has created a permanent gender specialist position to provide better focus and follow-up with the women members of the organization. The gender specialist is also a member of the Board of Directors of the MMFC and represents PROCOCER in the research partnership of this investigation. PROCOCER has also formed a

Gender Committee comprised of three cooperative members, although its functions and role have yet to be clearly defined.

Through CECOCAFEN, PROCOCER manages a women's project, the *Grupo de Mujeres en Ahorro Solidario* (GMAS), largely made up of the wives and daughters of PROCOCER members, or other women in the communities where PROCOCER operates. GMAS aims to increase the economic and organizational capacity of its women members, providing small loans for agricultural production or small businesses, savings accounts, training workshops on a variety of economic and social topics, as well as a local farmers market through which the members sell their products. Although GMAS is affiliated with PROCOCER, GMAS members cannot access PROCOCER services without membership, and PROCOCER is in the process of integrating these women as official members of the cooperative.

Action toward improving gender equity in the cooperative is still in its early stages and, in the absence of an official strategic plan or policy for gender equity, there has not been clearly defined operational steps for PROCOCER nor a consistent method of evaluating current actions. When considering the common indicators of gender equity in the FT literature – women's participation in the membership and leadership of the cooperative – PROCOCER currently has 24% female membership with no women in higher leadership positions. However, the underlying causes of these inequities go beyond merely counting women. The gender equity indicators developed in this study will assist PROCOCER with an evaluation tool towards this end, as well as detail the broad areas that need to be considered in future gender work.

2.3.4 Evaluating FT

In light of the growing demand for evaluation in FT, a multitude of qualitative – and more recently, quantitative – studies have assessed the impact of FT using a number of different methodologies, which makes comparisons and broader syntheses difficult. Many of these studies also point to the challenges in measuring the impacts on individual producers, as data is generally limited at the cooperative and household levels and many of the outcomes include intangible concepts that are difficult to measure, such as self-esteem and confidence (8,84). The challenges of quantifying these changes are multiplied by the sheer complexity and diversity of the structure of the cooperatives, their different operations, and the distinct conditions on the

ground (9,105). Other authors describe the difficulties in disentangling the impacts of FT from the myriad of other factors that influence producers (62). Most cooperatives sell only a portion of their coffee on the FT market and producers often submit only a part of their coffee harvest to the cooperative, selling the rest on the local market for their immediate cash needs (9,84) – factors that contribute to the obscurity of isolating the effects of FT. Elder finds that studies rarely compare the impacts between FT-certified cooperative members and non-FT-certified cooperative members, arguing that it is actually cooperative organization that is responsible for many of the positive outcomes identified by the producers (77). Finally, a number of studies encountered a lack of understanding and knowledge of FT among producers (80,82,91,105,106), which muddles attempts to assess producer benefits from their participation in FT.

There are growing calls in the literature for a consistent approach to evaluate FT (9) and for increased methodological rigor in the impact assessments (8). FLO is addressing this need by implementing a Monitoring and Evaluation system based on indicators at the level of the producer organizations as well as a case study approach to assessing the long-term impact of FT (92). Data for FLO indicators are derived from the audit reports of the producer organizations, and there is little documentation on the selection process of the twelve indicators (92). Nelson and Pound argue that a broad range of welfare/quality of life and empowerment indicators is needed for a more complete understanding of the impacts of FT (8). They also emphasize the importance of grounding assessments in the views of participating farmers and other affected stakeholders in FT (8), a view echoed by Paul (9): "participatory techniques seem wholly appropriate to the 'philosophy' of Fair Trade, given that it is founded on the principles of partnership and strengthening of local capacities…" (p.141) This study will contribute to this discussion by proposing not only common indicators to assess gender equity in FT, but also a model of participatory indicator development to build on existing evaluation efforts and inform new directions in how impact assessments are conducted.

2.4 Indicators

In the recent report commissioned by FLO Central America (6) on gender equity in Nicaraguan FT coffee organizations, the investigators identify a major obstacle that, "the

organizations do not have gender indicators that allow them to measure advances in terms of equity at every level and act on them." (p.35) Indicators are tools that measure specific conditions or situations by using summary representations to simplify complex realities (107). They function to signal changes in these conditions or situations over time in order to "feel the pulse" of a project or phenomenon (99,108). The most widely used are objective indicators, which are measures of quantity, independent of personal evaluations, and usually drawn from data of more formal surveys, such as education or annual income levels from census data (19,107-109). Subjective indicators measure attitudes, perceptions and experiences, such as self-reported health and one's sense of control of their life (108). They rely on less formal information sources (ie. findings from Participatory Rural Appraisals, interviews, observation) and can be quantified into numerical scales (37,110). While objective indicators signify how common or widespread a certain result is, subjective indicators are useful for understanding processes and local views (19,108). Both are necessary to gain a more complete picture of a given situation; each measure complements the other and provides a means to triangulate data (108). While large numbers of indicators can make overall assessments and comparisons cumbersome, composite indices can facilitate this process through a mathematical aggregate of the indicators into a single value (109). The creation and interpretation of a composite index must be considered carefully, as it has the potential to mask certain elements or changes (109,111) and will not be pursued in this investigation.

A range of different types of indicators is available to serve the variety of purposes in which indicators are used. As indicators are prevalent in diverse disciplines – from environmental science to program evaluation to economics – synonymous terminology have emerged as a result of its wide application. In evaluation and monitoring, risk/enabling indicators assess the influence of external factors on the program, project or intervention, while input indicators measure the resources allotted to the program (108). Process indicators track the progress towards specified objectives on an ongoing basis, output indicators monitor intermediate results and outcome indicators measure the long-term impacts (108). The indicators presented in the Strategic Plans of MMFC and PROCOCER are examples of organizational process indicators with specific time targets by which to achieve the objectives.

The suggested criteria of sound indicators are correspondingly extensive and varied. The

purpose of indicators is to provide an accurate representation of a phenomenon, while also balancing the practical aspects of affecting policy and promoting realistic change within the limitations of the project or organization. To address these multiples roles, the characteristics of a "good" indicator are contingent both upon the scientific objectives of rigor and validity while also being responsive to the needs of the intended users (108). As this study is bounded by the mandate of the PROCOCER cooperative, the indicator criteria applied in this investigation is based on Roche's SMART properties (112), CIDA's guidelines for organizational impact assessment (108), and Rossi and Gilmartin criteria (109) (Table 1).

Table 1. Criteria for the selection of indicators. Adapted from Roche (108), Rossi and Gilmartin (109), and Beck (112).

Property	Definition
Validity	• Internal validity: the accuracy with which the indicators measure the concept of interest. • External validity: the degree to which the indicators are generalizable to the population of interest.
Specific	• Indicators reflect aspects that the project intends to change. • Avoids measures that are subject to external influences.
Measurable and unambiguous	Indicators are clearly and precisely defined so that their measurement and interpretation is unambiguous.
Attainable and sensitive	• Indicators should be achievable by the project and sensitive to current changes in the concept being monitored. • Enable comparisons across groups over time and allow for aggregation of data.
Relevant and easy to collect	• Data for chosen indicators can be collected on a timely basis and at a reasonable cost. • Indicators are relevant to the needs of the user and the objectives of the project.
Overlap with other indicators	Indicators measure overlapping aspects of a condition
Understandability	Easy to use and understand; can be interpreted by the public.
Normative interest	There is a definition of which direction of change is "good," according to the objectives of the project
Forward-looking	• Indicators are not restricted to conveying information only about current conditions. • They should highlight concerns that may not appear to be immediately important, but may become significant in the future.
Small number of indicators	Avoid "information overload" but also "over-aggregation."

2.4.1 Gender equity indicators

Among the host of gender indicators in the literature[16] (113) – the majority of which are macro-level and quantitative measurements (114) – the most well known are the Gender-Related Development Index (GDI) and the Gender Empowerment Measure (GEM), which had been used by the United Nations Development Program (UNDP) (115). GDI adjusts the Human Development Index (measuring life expectancy, adult literacy and per capita Gross Domestic Product) to account for gender differentials (116) – although the actual "penalty" for gender disparity is small (117) – and GEM focuses explicitly on the political and economic disparities between women and men (19,116). The Gender Inequality Index (GII) has recently replaced these two measures and is similar to the GDI assessment, except for the added dimension of reproductive health and measuring women's labour force participation instead of their share of Gross Domestic Product (115). Despite the improvement of the GII measure in capturing gender differentials, one of the main criticisms of these composite measures is the unavoidable value judgments that influence the choice of indicators to represent a certain conceptualization of gender equality (111). For example, comparing the number of seats women hold in government to that of men is an assessment of the political participation of a small number of women in a country and is only representative of a certain type of political empowerment. This is a limitation that the UNDP recognizes, claiming that the exclusion of certain key issues in gender equity – such as violence and asset ownership – from the GII index is primarily due to the limited availability of national-level data on these aspects (115).

In the health literature, Lin et al.'s review (118) found that most of the existing gender indicators focused on biomedical factors such as mortality and morbidity rates rather than more inclusive measures of health and well-being. Where indicators account for the determinants of health, socioeconomic status takes primary focus, neglecting other important aspects such as household, community and psychosocial factors (117,118). Gender equity indicators must therefore encapsulate the multiple dimensions of gender equity. The Pan American Health Organization's biyearly report, *Gender, health and Development in the Americas: Basic Indicators* is a good example, providing an extensive list of gender disaggregated indicators that measures a wide range of the health status outcomes and social determinants (119). Gender

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[16] Permanyer (113) provides an overview of macro-level gender inequality indices.

equity indicators should not be confused with gender-sensitive indicators, as the latter indicates measurements for a chosen phenomenon that is disaggregated by sex (19) while the former specifically seeks to assess gender equity.

Within Nicaragua, the *Instituto Nacional de Información de Desarrollo* (INIDE), the governmental department responsible for national statistics and census, is the primary source of gender-disaggregated socioeconomic data (http://www.inide.gob.ni/), while a number of civil society organizations have also conducted independent assessments of gender equity, such as FIDEG's report on women's status in rural households in Nicaragua, drawing upon a variety of economic and social indicators (60,120). More recently, Cafénica conducted a study examining the socioeconomic situation and condition of the small-scale woman coffee producers within the organization, reporting on a range of productive, organizational, and socioeconomic data (93). Although these resources do not provide a list of gender equity indicators *per se*, they provide important thematic considerations for indicators in the context of women in rural Nicaragua. It is important to stress that indicators alone can never fully capture the intricacies of gender issues (108), however, they serve as one tool upon which further research on women's experiences can be based.

2.4.2 Women's empowerment

The empowerment of women has a fundamental role in transforming gender relations: "through empowerment, women become aware of unequal power relations, gain control over their lives, and acquire a greater voice to overcome inequality in their home, workplace and community." (20) Assessments of gender equity in FT have most often been based on women's empowerment frameworks (7,81,91,95), as empowerment has been a vital theme of FT and has also been identified by feminists of the South as central to transforming gender power relations. Whereas the concept of empowerment is broadly drawn from many disciplines, in the health literature, empowerment is defined as a process in which individuals, communities and organizations "gain understanding and control over personal, social, economic, and political forces in order to take action to improve their life situations" (121)(p.152). The concept of empowerment entails a process of change in an expansion of the ability to make strategic life choices where this ability was previously denied (110). It has roots in social justice and

enhances both the personal and collective capacity to cope with and respond to stressors (121,122), leading to increased self-reliance and internal strength for resistance (16,123). The health outcomes of empowerment can be direct, such as the increased agency to make decisions on issues that affect them, or indirect, such as decreased social isolation and the resulting improvement in health (122).

The concept of empowerment is inherently embedded in the embodiment and exercise of power, which has been defined in diverse ways. Power has often been framed as a zero-sum phenomenon in a relationship of dominance, where increasing the power of a person results in diminishing the power of another (124); however, focusing on power as a process that "means negotiating new kinds of relationships that are based not on power over others but on mutual development of creative human energy…" (94)(p.3) is more conducive to the purposes of this investigation. The different forms of power have often been differentiated as *power over*, which connotes control over others, *power to*, generative power that promotes new possibilities and actions without domination, *power from within*, the personal power of an individual, and *power with*, the greater strength developed by a group acting together (124,125). Beyond localized relationships between individuals and collectives, it is important to recognize that empowerment approaches are entrenched in institutional and organization structures as well as national and global forces, all of which have vital roles in shaping the empowerment process (124,126).

In the development literature, the empowerment approach emerged in the mid-1980's (127) as a reaction of feminist scholars, activists, and grassroots organizations – the majority from the South – against Western domination of feminist discourse that largely characterized Southern women (or "Third World Women") as an undifferentiated "other." (123)(p.35) The empowerment approach is grounded in the experiences and knowledge of women and men from the South, emphasizing difference and multiple identities, particularly in the distinct experiences of oppression across race, class, and colonial histories, among other identifiers (16,26). In this sense, empowering women does not entail women taking control away from men, but rather in terms of transforming the nature of power relations and re-distributing power within and between societies and nations (16,128). As Rowlands (124) writes, "empowerment of women is for women to experience; it does, however, require the behaviour of men to change…" (p.132) and as such, goes beyond being solely a women's issue to being a gender

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issue. As with its grassroots origins, empowerment is a bottom up model that "cannot be 'done' to women" by a third party as if it were a service or commodity (128)(p.35), although facilitators and external support are important to fostering and supporting the process of empowerment (129). That power can be defined and acted on in a myriad of ways contributes to the ambiguities of its applications and implications.

2.4.3 Measuring empowerment

Parpart et al. (126) describe empowerment as both a process and an outcome that is fluid and relational; "what is seen as empowering in one context may not be in another." (130)(p.3) Many feminists attest to the indefinable and therefore immeasurable nature of empowerment, further complicating the challenges and complexities of identifying indicators for this concept (110,126). As such, indicators of empowerment must be flexible and wide-ranging, but also context-specific (129); and as these concepts evolve, the indicators also "are likely to change, possibly quite radically, over time." (124)(p.140) Many of the attempts to define, measure, quantify, and analyze empowerment have been undertaken by the World Bank, although their approach has been criticized as "decaff" and depoliticized from its original meaning (127)(p.22). While empowerment has increasingly become a permanent part of the vocabulary in development interventions, it is often viewed only as a means to improve productivity (124) and ignores the power structures that have excluded and disempowered the intended recipients in the first place (127). Assessments of women's empowerment in micro-credit programs and small enterprise development may be of particular use to the discussion at hand, given the similarities in the economic intervention and group dynamics of these initiatives, though with varying potential for social and political transformation. Consequently, care must be taken in the extent to which these resources can be applied to the present study, as many of these models are biased towards economic impacts. Mayoux (94) argues that "women's empowerment is more than simply marginal increases in incomes: it requires a transformation of power relations" (p.2) not only in national and international economies but also within households and communities. The vignette of Sayra's experience in the Introduction chapter illustrates the multidimensionality of empowerment, where increased empowerment in one aspect of her life does not directly correspond to increases in other aspects (129).

Studies of gender in FT have predominantly been framed within Sara Longwe's Women's Empowerment Framework (7,91), as has MMFC's Strategic Plan (100), which associates increases in empowerment with corresponding increases in equality (131). However, the dimensions of Longwe's framework are rather broad and abstract for the purposes of this investigation. Instead, an adapted version of Mayoux's Empowerment Framework for impact assessments of women in enterprise development projects (Table 2) provides a more appropriate framing for indicators that will be tailored towards the use of an economic cooperative.

Table 2. Mayoux's Empowerment Framework (94).

	Type of power relation			
Economic empowerment				
Well-being benefits	Power within	Power to	Power over	Power with
Cultural/legal and political empowerment				

This framework includes the dimensions of economic empowerment, women's well-being, and cultural/legal and political empowerment, each further disaggregated into the four forms of power: power within, power to, power over, and power with (94). In this model, *power over* refers to control over resources and individual action to challenge resource and power constraints rather than domination over others (94). Furthermore, this framework highlights the personal as well as collective processes of empowerment while acknowledging the influence of the household and institutional environment in enabling the exercise of empowerment (94).

That empowerment in Mayoux's model is framed as different but equal typologies of contextual dimensions is ultimately more conducive to discussions of gender equity in the PROCOCER cooperative, as it allows for a fluid envisioning of different power relationships between women and men, and women and their resources. This conceptual framework guided the discussions and identification of the dimensions of gender equity, which were then further operationalized into indicators.

2.4.4 Participatory indicator development

Indicators are inherently subjective and the selection of indicators is a fundamentally political and value-laden practice (116,132). Kabeer (133) writes, "[i]ndicators not only compress a great deal of information into a single statistic but make assumptions, often implicit, about what this information means." (p.452) The fact that most indicators are developed by researchers with limited public engagement (94,134) severely limits the accuracy and relevance of the indicators to the intended beneficiaries. In order for indicators to accurately reflect the values and beliefs of the communities of interest and hold relevance for them, it is essential that the indicators be developed with the active participation of those they aim to measure.

Participatory approaches to indicator development are generally considered within the broader paradigm of participatory monitoring and evaluation. The latter concept was formulated in the late 1970's and radically diverged from conventional forms of evaluation where outside professional experts "objectively" assessed a development project or organization without challenging the power relations inherent in this process (135). Whitmore (136) contends that, "issues of power are present in all evaluations whether a participatory approach is used or not" (p.222); power differentials exist between the evaluator and participants and also within the organization and community. Participatory evaluation aims to empower the participants to analyze and address the issues they face as well as intervene on the side of those with less power (135-137). Participation is a broad term that encapsulates diverse interpretations, and approaches to participatory evaluation are correspondingly varied in order to address very different contexts (138), from engaging expert evaluations to select the indicators to consultations with stakeholders to community control over the process (139).

Indicators are a central component of participatory evaluation. In comparing the differences between conventional and participatory approaches to evaluation, the former utilizes "predetermined indicators of success, principally cost and production outputs" while in the latter "people identify their own indicators of success, which may include production outputs." (140)(p.16) The benefits of engaging the intended beneficiaries in the development of indicators are two-fold: it ensures that the indicators developed will have a greater impact in the community where they are used, and the process of participatory indicator development provides an opportunity to increase the knowledge and power of the community involved

(124,141). Particularly in this study, as gender equity is embedded in cultural and social values, the dimensions of gender equity must reflect the conceptualizations of the women and provide a space for women to influence and direct the initiatives that are aimed to improve their well-being.

Despite the proliferation of literature on participatory monitoring and evaluation, there is a paucity of literature dedicated to indicator development in its own right. Interestingly, some of the documented participatory evaluation projects rely on indicators predetermined by external experts (142). Where participatory approaches are employed, there is often inadequate description of the actual processes or methods used (137,139). For example, reports rarely document the strategy used by the research team to prioritize differing perspectives in the community consultations (143), or the participants are often uniformly captured under the general term "stakeholders," with vague descriptions of who these stakeholders are or how they had been selected to represent the community (144). Few documented examples in the academic literature have actively involved community members from the early stages of the process (134). Most of the academic literature on participatory indicator development is located in natural resource management initiatives (134,145,146) where evaluators and/or researchers engage local community members for the selection of indicators to monitor environmental changes that are relevant to local contexts. There are also examples in Aboriginal health (147) and in community development (114,141).

Other resources detailing methods for participatory approaches to indicator development can be found in the grey literature. As the methodology of participatory evaluation is closely related to that of participatory action research, many of the approaches draw upon existing participatory methods of evaluation such as Participatory Rural Appraisal. The SPICED criteria (112) for participatory impact assessment in development agencies describe the key components needed in developing indicators through a participatory process (Table 3). The guide *Eyes that see… hearts that feel: equity indicators*[17] details a project to create gender equity indicators for rural development projects in Central America and provides a comprehensive and valuable resource for the methodological design of this investigation (99). The methods include participatory workshops with experts and community representatives, field visits to the rural

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[17] Translated from the Spanish title: *Ojos que ven… corazones que sienten: indicadores de equidad.*

communities, and interviews with project participants.

Indicators are often selected based on the available data sources, which often results in the exclusion of important concepts, as was the case with the GII index (115). Conversely, participatory initiatives often create indicators based on the study findings, which raise significant issues in collecting the appropriate data to obtain the information needed for the indicators. In some cases, the proposed indicators for which data was unavailable were still included in the final model to highlight knowledge gaps (134,147), and possible instruments for gathering the missing information are suggested (99).

Table 3. SPICED properties of indicator development and assessment (112).

Properties	Definition
Subjective	Recognizes the value of the experience and indigenous knowledge of informants.
Participatory	Involves the project's ultimate beneficiaries and other important stakeholders.
Interpreted and communicable	Locally defined indicators needs to be clearly explained to other stakeholders who may not understand the context.
Cross-checked and compared	Assess validity by comparing different indicators, getting feedback by different informants, methods and researchers.
Empowering	The process of developing and assessing indicators should be empowering in itself, allowing groups and individuals to reflect critically on their changing situations.
Diverse and disaggregated	Deliberate efforts are made to seek out different indicators from a range of groups; these differences can be assessed over time.

Finally, the capacity of community participation in evaluation projects cannot be assessed as a dichotomous "present" or "absent." Rather, it is often envisioned as a continuum in the literature (135), in which "low participation" represents the involvement of project beneficiaries as passive recipients and "high participation" represents the beneficiaries as completely self-managing where power is fully shared. Daigneault and Jacob (138) further contextualizes this conceptualization into three conditions to describe or classify participatory evaluation, each condition exhibiting this spectrum of low to high participation: control of the evaluation process, diversity of stakeholders, and depth of participation. The factors and conditions that impact this relationship will be explored in the ensuing chapters.

2.5 Summary

This investigation is responding to calls within FT research and organizations for a comprehensive set of indicators to measure gender equity, locating this research question within the context of the PROCOCER cooperative. The succession of indices to measure gender equity worldwide, from the GDI to GEM to GII, epitomizes the challenges of quantifying a complex social construct on a global scale. These sweeping measures fail to account for the currents, conflicts, and achievements that are taking place on the local scale where, arguably, most of the changes in gender relations are being experienced by women and men. As such, proponents for context-specific indicators argue that "universal" indicators do not exist; they must be designed and adapted for the specific context and objectives of the phenomenon or project (108,129). The microcosm of social, political and economic relations that have been detailed in this chapter – the intersecting factors of the existing international order commanding the coffee industry, the historical currents in Nicaragua, women in FT and PROCOCER – all influence the unique indicators selected to represent this specific context. As such, it is imperative that the methods employed towards this end not only allow for, but more importantly advance, the participation of these women and men in order to create relevant indicators and also build their capacity to develop their own means of evaluation – themes that will be explored in the following chapter.

Chapter 3. Methods

3.1 Methodological approach

The design and conduct of research is not a neutral process, as "the choice of one method over another is not simply a technical decision, but an epistemological and theoretical one." (148)(p.271) This investigation responds to the call of the Commission on the Social Determinants of Health for empirical evidence to assess interventions on the determinants and for a broader definition of what constitutes evidence (2). As causal pathways of the social determinants of health are dependent on a broad range of factors that are unique to specific contexts, Marmot and Friel (11) argue that a variety of different research methods are needed to inform action on health inequities and evidence should be gathered on a "fit-for-purpose" basis (p.1096). As gender equity in FT is a nascent area of research, this study design has been developed within a naturalistic framework of inquiry for an exploratory and inductive examination of these gender issues. The principles of community-based participatory research and feminist approaches guide the basic interpretive qualitative research methods used in this investigation, employing a series of focus groups and key informant interviews to define and validate the indicator set. This chapter begins with a discussion of the theoretical basis for these approaches, followed by a detailed description of the indicator development process engaged in this study, concluding with a discussion of ethical considerations and my role as the researcher.

3.1.1 Community-Based Participatory Research

Participatory evaluation approaches have typically drawn from the traditions of participatory research or participatory action research – two methodologies that, despite their respective differences, share the common attribute of actively involving members of the group or community being studied in the research process (149). These approaches are gaining popularity in the health disciplines, particularly in interventions addressing health disparities (150), where the term community-based participatory research (CBPR) has increasingly been used (149). CBPR is a theoretical approach that aims to address the inequitable power relationships between the researcher and the researched, a process that necessitates the deconstruction and transformation of the epistemological understandings that underpin the generation of knowledge (151). In challenging the ways in which power shapes the research

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process, CBPR espouses a

> "…collaborative approach to research that equitably involves, for
> example, community members, organizational representatives, and
> researchers in all aspects of the research process. The partners contribute
> "unique strengths and shared responsibilities" to enhance understanding of
> a given phenomenon and the social and cultural dynamics of the
> community, and integrate the knowledge gained with action to improve
> the health and well-being of community members. (152)(p.177)

Additionally, CBPR recognizes the community as a unit of identity (which may include geographic boundaries, an ethnic identity, a cooperative, among others) and builds on the strengths and resources within the community in a process of mutual learning and capacity building of all partners (149). Research is viewed as only one piece of the larger process of social change (153) with the ultimate purpose of the knowledge generated to improve the health of the communities involved (154). The research process is not just located within a community, but is developed with and for the community members (151). Inherent to this characteristic is the "democratization of knowledge" (151)(p.501) and the dissemination of results to all partners and a commitment to the long-term sustainability of the research program (149).

CBPR is an approach that guides not so much what methods are used, but rather how these methods are used (155) and the core values and principles underlying the research process (149). All partners in the project have equal, albeit different, contributions and no one form of knowledge takes precedent over another (151). This is an essential understanding in the development of indicators, as it is my belief that only communities can define their own strengths and assets. While the creation of indicators can never be entirely unbiased, using a CBPR approach will ensure that the outcomes of this study will better reflect the conceptualizations of gender equity that are unique to the participants.

CBPR emphasizes the involvement of affected stakeholders in every phase of the research process, from the identification and definition of the research problem to gathering data and interpreting results (155). In this study, the need for research on gender equity indicators was collaboratively identified by the larger research partnership on FT, gender, and health in Nicaragua. Though I became involved with this partnership when the initial stages of formulating the research agenda had been established, the background of how this research agenda was conceived deserve mention here as a vital process in CBPR. This research

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partnership grew out of the perceived contradictions by la FEM between the official rhetoric of FT in gender equity and the lived experiences of the women coffee producers. La FEM has a longstanding relationship with Dr. Lori Hanson, the principle investigator leading the partnership and my thesis supervisor. Their discussions led to Terstappen's case study of la FEM (7) and an environmental scan to identify existing resources, programs, and research on these themes as well as potential collaborators in 2009. The results of these studies culminated in the collaboration of fourteen FT coffee cooperatives, NGOs, research institutes, and other relevant organizations in an action-research program that identified three research projects necessary to further this agenda: 1) an ethnographic study on the invisible labor of women engaged in FT- and organic-certified coffee production, 2) an exploratory study on the processes that promote gender equity within FT-certified cooperatives, and 3) a study to develop a set of indicators to measure gender equity in the cooperatives (this study).[18] As this brief narrative illustrates, the multi-level stakeholders in this partnership defined the overarching research questions that frame this investigation within a long-term vision and commitment to this agenda.

Another important aspect of CBPR is the participatory design, implementation, and interpretation of the study with key project stakeholders; however, given the time and resource constraints of a Master's thesis, I could only engage the research partnership in a limited capacity. Upon entering the field, I presented my research proposal to a meeting of the research partnership and to the leadership committee of PROCOCER. In spite of the written research proposal, I approached these organizations with a level of openness and flexibility in the research questions and design to allow for changes that would better address the needs and context of my partner organization. These partners all gave their approval of the research proposal and there were few revisions by the partners except for minor practical details pertaining to study locations and participants. I worked closely with my organizational counterpart in PROCOCER (the gender specialist) in developing the research design and data gathering instruments. I was primarily responsible for data collection and analysis and I made the majority of the decisions on the selection of the indicators, although I attempted to reflect

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[18]Alejandra Ganem-Cuenca, a Master's student who conducted the second research project of this agenda (200), also worked closely with PROCOCER during overlapping periods of my fieldwork, and we provided considerable support and collaboration to each other's respective studies.

the needs of the cooperative staff and members to the greatest extent possible. I provided a report on the indicators and study findings in Spanish for PROCOCER and the research partnership, with the intention that these resources be further disseminated through their own networks. As an action-research project, this study will inform efforts to improve the wellbeing of women and men in PROCOCER as well as contribute to their capacity for future participatory evaluation efforts. Along the spectrum of participatory research, this project alone may not be fully demonstrative of completely equitable control and participation in the entire research process; however, this study should be considered as one piece in the broader context of a long-term relationship among the partners. It is representative of the challenges and constraints that can limit the extent to which the principles of CBPR can be undertaken as a Master's research project. It is important to recognize here the important role of my thesis supervisor, thesis committee members, and the university as critical supports for this type of research.

3.1.2 Feminist approach

Feminist approaches to research share similarities with CBPR in that they question the traditional power hierarchies in the construction of knowledge, placing particular attention to women's roles in the research process. Feminist research is a broad term that encompasses an array of methodologies and epistemologies, while sharing the fundamental common objective of challenging the basic structures and ideologies that oppress women (156). Rooted in the women's movement and feminist activism, feminist research was a reaction to the failure of academic scholarship to account for or accurately represent women's experiences (156,157) and places women's lives and their experiential knowledge at the centre of research (156). According to Hesse-Biber et al. (158)(p.4), the central tenet of feminist approaches requires "the acceptance of the existence of not one feminism but many feminisms," recognizing that women's experiences must be contextualized across different markers of race, class, sexuality, nationality, among others. This is the core value guiding this investigation, as the ultimate objective of this study is to work in solidarity with the women and organizations in Nicaragua and support their conceptualizations and approaches towards improving gender relations.

Knowledge is traditionally produced by and reflects the prevailing beliefs of the

dominant group in society (156). This is the case in the existing research on coffee production and FT, as studies often subsume women farmers under the generic category of the undifferentiated "farmer" or "producer" and assume the impacts are experienced equally by women and men (87). While gender equity requires the commitment of both women and men to effect change on existing conditions, this study takes the explicit stance that the perspectives and desires of women producers must first be understood as the vital missing component in the existing discourse on women in FT. Furthermore, this can provide an open space for women to feel comfortable expressing their views and discussing their experiences by reducing the potential for gendered power dynamics to silence marginalized voices.

As with CBPR, conducting feminist research does not command the use of specific methods but rather informs a feminist orientation into the choice of methods used: "feminism supplies the perspective and the disciplines supply the method." (159)(p.243) Feminist approaches aim to diminish power hierarchies in the research process (141), where the researcher engages in a dialogic rather than an extractive relationship with participants (160,161). Research is a personal and political process, and the practice of reflexivity is fundamental to feminist research, requiring critical self-reflection of the researcher's role and the dynamics of power and privilege in shaping the construction of knowledge (162). Finally, as Liamputtong describes, "undertaking feminist research is to witness resistance" (160)(p.10), with the foremost objective to support struggles to improve the wellbeing of women (158). In this investigation, the use of focus groups served to reduce power inequities between the participants and myself and contributed to an environment of mutual learning and analysis, and I kept a field journal that enabled me to reflect on and be cognizant of the power dynamics throughout the course of fieldwork. Finally, the ultimate goal of this study is to support the ongoing efforts of Nicaraguan women and organizations for greater gender equity within coffee production and FT.

3.2 Data collection methods

Stage 1 — Literature review

Stage 2
- Preliminary data gathering
  - 2 focus groups
  - 2 key informant interviews
- Preliminary data analysis
- Selection of indicator dimensions and concepts
- Operationalize each indicator concept

Stage 3
- Evaluation of indicators
  - 1 focus group
  - 4 key informant interviews
- Data analysis and interpretation
- Revisions for final indicator set

Figure 6. Participatory indicator development methods.

The data for this study were gathered over six months of fieldwork in Nicaragua (January to June 2010). Throughout this period, I was based in the northern city of Estelí, where I undertook intensive Spanish immersion classes for the first five weeks. I dedicated the following four weeks to gathering literature, continuing my rural immersion experiences, and meeting with potential partners for this study. After PROCOCER was established as my primary partner and research site, I traveled frequently to El Jícaro (where the PROCOCER office is based) and surrounding communities for the remainder of the field research phase. During these stays, I was able to spend considerable time at the PROCOCER office and shadow my organizational counterpart in her daily work and visits to the women members of the

cooperative. This helped me become more familiar with the dynamics and functioning of the cooperative as well as the cultural context of the organization and surrounding communities, informing the evolution of the methods and data collection instruments to accommodate the study context. These extended stays were also crucial to developing relationships and building trust with my counterpart, the PROCOCER staff, and the cooperative members. Data collection consisted of three interrelated stages outlined in Figure 6 and took place between April and June 2010; the methods will be described in greater detail in the subsequent sections. All of the interviews were conducted in Spanish and audiorecorded.

3.2.1 Stage 1: Literature review

The gender indicators found in the academic and grey literature from diverse disciplines served as the groundwork from which to build the indicators in this study. A review of the academic literature was conducted using the electronic databases PubMed, Academic Search Premier, Gender Studies Database, PsycINFO, and Google Scholar with combinations of the following search terms: gender equity, equity (social), gender equality, social equality, gender identity, empowerment, indicators, health status indicators, social indicators, evaluation, measurement. Given that this study is concerned with gender equity at the cooperative and individual levels, I sought additional literature specific to Latin America and agricultural contexts. Accessing resources in Nicaragua, however, was more complex as many of the documents are not digitized and cannot be searched electronically. In addition to Nicaraguan government websites and the library of the *Universidad Centroamérica*, the majority of the resources I gathered were from NGOs that had small collections and libraries. Among those various organizations in Nicaragua were the *Centro de Información y Servicios de Asesoría en Salad*, *Puntos de Encuentro*, and *Instituto Mujer y Comunidad*. The environmental scan conducted by the research partnership in 2009 provided many of the documents pertaining to gender in FT and the coffee industry, and many of the partners supplied additional resources relevant to this study. Although a more comprehensive review could not be conducted in light

of logistical and other practical constraints[19], the quality of documents I obtained was sufficient for the purposes of this investigation.

3.2.2 Stage 2: Development of the draft indicator set

Preliminary focus groups and key informant interviews with PROCOCER staff and members provided the exploratory data that informed the dimensions and concepts to measure gender equity in the cooperative. These data and the literature gathered from Stage 1 formed the basis from which the concepts were operationalized into the draft set of indicators.

3.2.2.1 Focus groups

Focus groups have been recognized as an important method in feminist research and CBPR, as it shifts the balance of power from the researcher in lieu of group dynamics and the interactions between the participants (163,164). These interactions produce distinctive types of data that may not be attainable by other research methods (165,166), and is conducive to exploratory research as it can generate information on a range of attitudes, perceptions, and experiences from different participants in a single session (167). In working with marginalized populations such as women coffee producers, focus groups can provide a supportive environment to discuss issues among peers (160) while also providing a space to reveal and challenge dominant beliefs and assumptions and through which alternative views can be articulated (168). Focus groups also have a role in fostering personal and collective empowerment by enabling participants to connect individual experiences with the collective, contributing to the process of consciousness-raising through shared experiences (148,168). However, the group dynamics can also function to silence or make it difficult for others to express views that are divergent from the dominant opinion of the group, especially in rural communities where the need for harmonious relationships may prevent open disagreement in the group (168). The moderator of the focus group has an important role in enabling diverse views to be expressed through effective facilitation (167).

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[19] One of the major challenges I encountered in this process was a type of "information hierarchy" where documents are generally not freely shared with outsiders in the absence of some kind of established relationship with the organization, and I even experienced this reluctance with my main research partner PROCOCER.

The use of focus groups in this study facilitates the exploration of a range of diverse conceptualizations of gender equity and reduces the power hierarchy between the study participants and myself. As an action-research project, the focus groups contribute contextualized data to evaluation while also providing a space for the women to discuss and reflect on gender issues where they have had few opportunities to do so previously. In the development of measurement scales, Streiner and Norman (169) suggest two or three focus groups to generate general themes and, after the items are developed, follow-up focus groups to validate the specific items. The focus group literature recommends between six to twelve participants in each group (148,169). In this study, 3 preliminary focus groups had initially been planned in 3 of the communities in which PROCOCER operates, with 8 participants invited for each group. However, difficulties in scheduling and transportation resulted in only 2 focus groups being carried out in the communities of El Jícaro and Jalapa with a total of 8 participants. My organizational counterpart recruited potential participants by convenience sampling, and purposive sampling was utilized where possible to include participants from diverse socio-demographic backgrounds. The focus groups took place in locations that are commonly used by PROCOCER as meeting sites: the meeting room in the PROCOCER office in El Jícaro and the patio of a member's home in Jalapa.

The *inclusion criteria* consisted of women members and coproducers of PROCOCER as well as women members of GMAS who have attended at least one gender workshop (so that the focus group discussions can draw from and build on previous experiences discussing gender issues). Although this study aims to investigate gender equity in FT coffee production, the study sample also included members who do not produce coffee for two reasons. First, a sizeable number of PROCOCER and GMAS members – particularly women members – do not produce coffee. Through discussions with my counterpart, we deemed it important to include the views of these members as the indicators are developed for the specific context of PROCOCER. Second, the PROCOCER membership is spread out over dispersed and often remote communities, and there were significant logistical difficulties in gathering adequate numbers of coffee-producing women members at the focus group sites. The *exclusion criteria* consisted of members who have been associated with PROCOCER or GMAS for less than a year (in order to select participants who have had longer and more involved experiences in the cooperative).

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The participants represented a variety of ages, from early twenties to late sixties. Many of the participants were members of both PROCOCER and GMAS, and one was only a member of GMAS. Two of the participants did not produce coffee, and the others produced coffee along with other crops. Only one of the participants held a leadership position in PROCOCER, and the participants belonged to a mix of female- and male-headed households. Although the focus groups had been intended as women-only spaces and only women were invited to participate, one of the invited women could not attend and sent her son to participate in her place without prior notice, which is a common practice in the cooperative. His participation did not appear to negatively impact group dynamics or affect the way in which the other women participated, and he contributed valuable insights to the discussion. The participants were reimbursed for taxi and/or bus fare, snacks and lunch were provided, and some of the participants brought their young children with them to the sessions.

I conducted all of the focus groups in Spanish with the assistance of Nicaraguan counterparts from PROCOCER. My organizational counterpart assisted with the first focus group where we shared the facilitation responsibilities and, as an unexpected scheduling conflict prevented her from attending the second focus group, a PROCOCER coproducer (who is actively involved with the cooperative and is well-known to the cooperative members) assisted me in her place. Both of my counterparts also contributed actively to the focus group discussions. Although the gender specialist holds a position of power in PROCOCER, my previous observations of her interactions with the women members revealed trusting and respectful relationships and I am confident that her involvement in the first focus group did not affect participant responses.

The focus groups were structured as *talleres* (participatory workshops), a common medium for education, training, and consciousness-raising in the cooperative and in Nicaragua. The learning and knowledge generated in these workshops are based on collective discussion and analysis using popular education techniques, a transformative approach to learning that empowers participants for social action to improve their own circumstances (170). The educator, instead of taking the role of the "expert" who imparts knowledge to the participants, instead acts as a facilitator in a cyclical process of reflection, critical analysis, and action based on the experiential knowledge of the participants (171). This method is frequently used in

CBPR (170) and in Nicaragua, as with the popular health campaigns in rural communities (37). This workshop model provided more culturally appropriate methods of gathering data and emphasized knowledge exchange between the researcher and participants as an important component of an action-research project, and is particularly appropriate for the varying educational and literacy levels of the participants.

Each focus group was about 2.5 hours in length. I designed the focus group sessions in collaboration with my PROCOCER counterpart and, although the activities and questions were altered slightly between the two groups to accommodate the small number of participants, the basic structure remained the same. The overall objectives of the focus groups were to better understand the gendered participation of the members and coproducers in PROCOCER and GMAS, collectively define the concept "gender equity" according to the participants' perspectives, and understand the hopes of the participants for gender equity in their productive work, in the cooperative, and in the household. I began each group with an introduction of my background, the study, and the study objectives, after which the participants introduced themselves, what they produced, and how long they (or their parents) have been affiliated with PROCOCER or GMAS. The first activity involved a facilitated discussion on the difference between gender equality and gender equity and the role of indicators in evaluating gender equity in PROCOCER. I used visuals and the example of *la planta sana* (the healthy plant) and *la planta enferma* (the sick plant)[20] to generate discussion and reflection on these concepts. This was followed by a discussion of the participants' experiences in productive work, in the household, and in PROCOCER or GMAS using a guide of semi-structured questions (Appendix 1). In the final activity, the facilitator recounted a narrative, "Dreams" (Appendix 2), where the participants were asked to imagine a world where gender equity had been achieved. The participants then shared their dreams with the group and what they felt was needed to achieve these dreams. The participants had the opportunity to ask questions or provide additional comments before the conclusion of the session.

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[20] An adaptation of *la vaca gorda* (the fat cow) and *la vaca flaca* (the skinny cow), an analogy commonly used in Nicaraguan workshops to facilitate analyses of underlying causes of periods of abundance and scarcity.

3.2.2.2 Key informant interviews

Semi-structured key informant interviews with two staff members of PROCOCER complimented and supported the focus group data by providing the organizational context and boundaries within which the indicators will be used. For feminist researchers, in-depth interviews seek the subjective understanding of an individual through their lived experiences, and the interviewer must pay particular attention to how her or his power and authority may interfere with the participants' perspectives in the interview (172). While the specific interview questions varied slightly between the two interviews due to the different positions of the two informants in the organization, they were organized along two broad themes of women's participation in the cooperative and gender equity indicators. The first theme centered on how women participate in the cooperative, the programs and services for women in the cooperative, and the factors that facilitate and limit women's participation. The second theme focused questions on the goals for gender equity in the cooperative, potential indicators that would be important in future evaluations, and the data sources available at the cooperative level. The key informants were selected based on their central roles in planning, implementing, and evaluating the gender work in the cooperative. The first key informant was the gender specialist of PROCOCER, and the interview was about an hour long in total and conducted over two meetings. The second key informant was the coordinator of technical assistance in the cooperative, an area that included the work of the gender specialist. I conducted this interview together with Ganem-Cuenca as a result of the difficulties in scheduling an interview with this informant. Ganem-Cuenca and I integrated our respective interview questions to avoid overlap and the interview was around 1.5 hours in length.

3.2.2.3 Data analysis

Nicaraguan research assistants transcribed the audiorecordings from the focus groups and key informant interviews, while I checked and cleaned the transcriptions to minimize the amount of missing data and to ensure the verbatim transcription of the dialogue. I analyzed the data in its original Spanish language, as translations may increase the potential for meanings to change. I reviewed my field notes to account for elements such as non-verbal communication that I observed in the focus groups and interviews, which assisted with my analysis of the

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transcriptions, although the actual field notes were not analyzed at this stage. I conducted a content analysis of the data by open coding, a process outlined by Berg (163)(p.303-329), identifying common themes that emerge from the data as potential concepts that comprise gender equity. In the initial coding procedure, the data was analyzed and coded minutely for a wide inclusion of emerging themes (163), which were eventually reduced to key concepts (Figure 7).
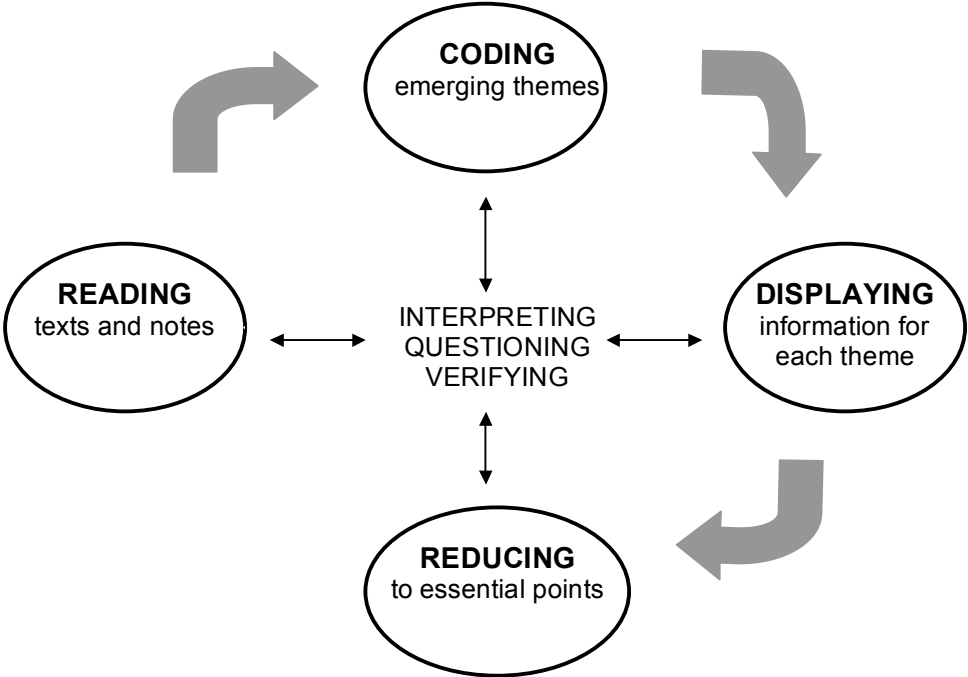
Figure 7. Qualitative data analysis, adapted from Ulin et al. (166)(p.144).

Given the relatively small amount of data, I manually coded the data, noting the frequency with which concepts were discussed and taking detailed notes throughout the process. The findings from this analysis, the three key documents from the literature review (the MMFC Strategic Plan for 2009-2013, the PROCOCER Strategic Plan for 2008-2010, and PROCOCER Proposal for the Gender Equity Strategy), as well as the indicator criteria (Table 1) informed the development of the indicator dimensions, which were broken down into indicator concepts before being operationalized into indicator variables (Figure 8).
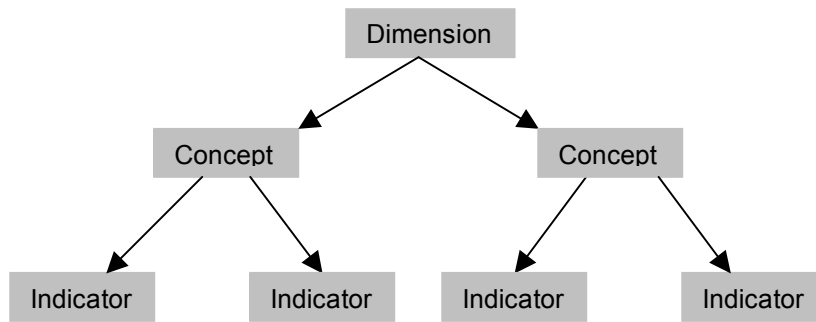
Figure 8. Organization of indicators.

3.2.3 Stage 3: Collecting validity evidence for the draft indicator set

A number of methods were employed to establish the trustworthiness of the findings in the qualitative research process (166). Multiple data gathering methods helped to triangulate the findings while the use of interview guides for the focus groups and interviews enhanced the dependability of the study (the ability to replicate study procedures). I maintained a field journal throughout the research process that enabled me to become more aware of and limit the influence of my personal perspectives and values in the research activities, contributing to the confirmability of the findings (the extent to which the data accurately reflects the participants' perspectives and experiences). The transferability of the findings (whether the conclusions are transferable to other contexts) is considered by providing thick descriptions of the study context.

Moreover, an epidemiological evaluation of the draft indicators requires assessment of validity (how closely the indicator measures "reality") and reliability (how consistently the indicators measure the same result in unchanging situations) (173). The primary means of collecting validity evidence for the draft indicators consisted of expert review through four key informant interviews and a form of member checking (verifying my interpretations with the informants) through a follow-up focus group with the original inquiry participants. An assessment of reliability requires the comparison of multiple observations over time (169), which was not possible in this study as the data sources for the indicators were not yet available.

3.2.3.1 Interviews and focus group

Each key informant interview ranged between 1 to 1.5 hours in length. I began by introducing the purpose of the study and the objective of the indicator set, detailing the methods I used to develop the indicators and presenting the participant with the draft set of indicators for review. The interview questions were structured to guide the interviewee through an analysis of the relevance and validity of the concepts and indicators (Appendix 3), and the key informants were encouraged to modify or add concepts where needed. Following each interview, I revised the draft indicator according to the comments from the key informant before the next interview. The key informants included a consultant who developed the indicators for the MMFC Strategic Plan and a leadership member of la FEM. I had been in contact with both of these informants as I was developing this study and their extensive experience in women's empowerment in coffee production and cooperatives contributed feminist perspectives to the indicators. In PROCOCER, the gender specialist was interviewed again and, due to scheduling difficulties with the cooperative coordinator interviewed in Stage 2, the manager of PROCOCER was interviewed in his place.

All of the participants who attended the focus group in Stage 2 were invited to the follow-up focus group. In light of the small number of participants, one focus group at the PROCOCER office was organized for all of the participants. Last minute scheduling complications prevented both of my counterparts from attending the session, and though I was unable to find a replacement, I had established a level of rapport and trust with the participants that I did not encounter any facilitation or communication difficulties. A total of six participants attended the session: five of the original focus group participants with an additional woman member of PROCOCER who had not been able to attend the previous focus group but had continued to express interest in being involved in the study. Her absence from the previous round of focus groups did not affect her ability to participate or the dynamics of the group in any significant way.

The follow-up focus group was around 2.5 hours in length, beginning with a review of the purpose of this study, what was discussed in the preliminary focus groups, and an icebreaker exercise for the participants to get to know each other better. Collecting validity evidence for the indicators began with an activity to evaluate the indicator concepts. The indicator concepts

were divided into two dimensions: the PROCOCER dimension and the Family and Individual dimension. Starting with the PROCOCER dimensions, the participants worked in groups of two and each pair was given a set of seven cards, each card containing one of the indicator concepts and a representative picture to assist with literacy. Each card was placed in a linear order of importance to the participants (Figure 9a), and the participants presented their results to the group and how they arrived at that ordering. Where consensus was not reached within the partners, they were encouraged to explain their different decisions. Following the presentations, the participants were asked to reflect on the relevance of each concept to gender equity and whether any other concepts need to be included. This activity was repeated for the seven concepts of the Family and Individual dimension. In the final activity, "Bull's-eye," the participants evaluated some of the specific indicators. Each participant was given a paper arrow, and after I read out the indicator for a concept, each participant placed their arrow on the large target drawing (Figure 9b) according to the accuracy with which they felt the indicator represented the concept. The further the arrow was from the bull's-eye, the lower the accuracy of the indicator in measuring the concept.
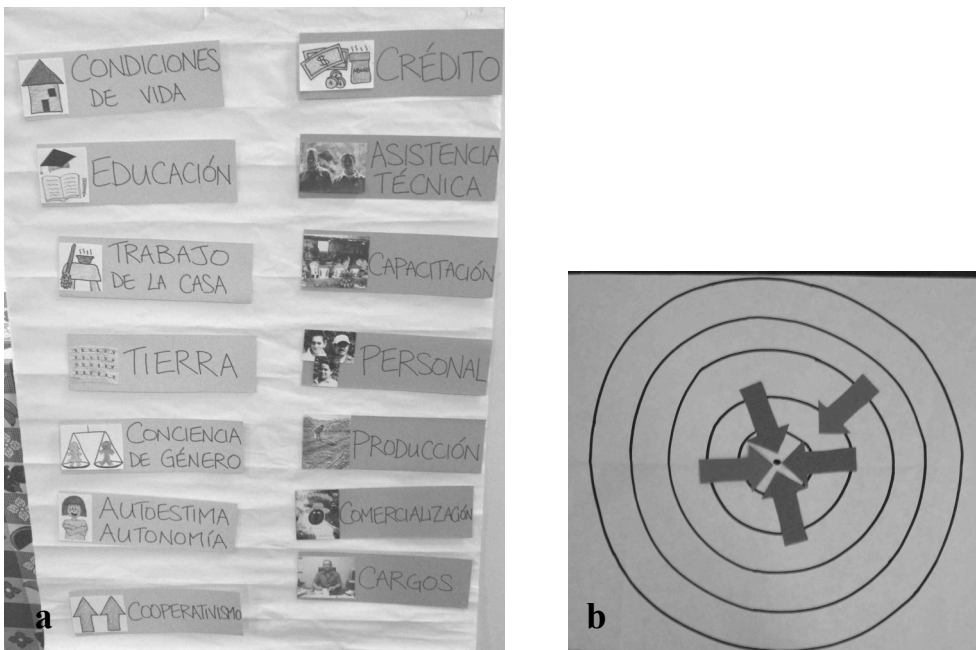
Figure 9. (a) Evaluating the indicators concepts. (b) Evaluating the indicators.

In addition to these activities, I facilitated a discussion that responded to the participants' questions from the preliminary focus groups around FT and FT pricing through an activity that introduced the structure of the international coffee industry, the role of FT in transforming this structure, and their role as producers. Although this session did not directly contribute data to this study, it was an important part of knowledge exchange and reciprocity in the research process, and the participants commented on the valuable knowledge they gained in this activity.

Aside from the interviews and focus groups, I regularly recorded my observations, reflections, and decision-making processes in a field journal. This journal enabled me to document my thinking and action processes on the research process and also how my interpretations influenced knowledge generation, which was particularly imperative to the exploration of the participatory development of indicators. This practice also served as an audit trail to enhance rigor in data collection (174). I recorded a total of 58 entries, which were converted into digital files.

3.2.3.2 Data analysis

Data analysis in this stage was conducted in greater depth. Analysis began with my immersion in the data, listening and re-listening to the audiorecordings, reading and re-reading the transcripts. The 14 indicator concepts provided the initial themes for coding, and these themes were reduced or new themes were added as they emerged from the data. In balancing the different and often opposing perspectives of the diverse participants, the gender specialist was given the greatest precedence as the person who will be using the indicators, followed by the group participants as the intended beneficiaries of this initiative. This was not, however, a strict rule. For example, concepts that were only scarcely mentioned in the PROCOCER data but that I considered essential to gender equity in the PROCOCER communities based on the literature, external key informants, and my observations were included in the indicator concepts. While each indicator criteria in Table 1 was considered in the selection of the indicators, the *attainable* and *easy to collect* properties were given particular preference in order to be realistic to the boundaries of PROCOCER's mandate and the data available to the cooperative.

I carried out a separate analysis of the data to address the second research question on the participatory process of indicator development, following a similar procedure to that described in Stage 2.

3.3 Ethics

This study has been approved on ethical grounds by the University of Saskatchewan Behavioural Research Ethics board on February 5th, 2010, with amendments approved on May 10th, 2010 (Appendix 4). Although there is no equivalent ethical review board in Nicaragua, I worked closely with my organizational counterpart to ensure that research was conducted in an ethical way, and she approved the research proposal, interview instruments, and ethics agreements before their use. All research assistants who had direct access to the raw data signed confidentiality agreements to protect the identity of the participants. Due to the varying levels of literacy of the focus group participants, I sought oral consent for the participant agreements and photo release forms to ensure the participants fully understood their rights in this study.

3.4 Reflexivity

As the construction of knowledge is never value-free, reflexivity is a fundamental practice in feminist research that requires me to be critical of how my positionality and biases, power and privilege intervene and shape the research process (172). While I am a woman working with other women on gender issues, I am also an urban Canadian researcher working with rural Nicaraguan participants. The multiple layers must be peeled back to understand the complex interplay of these influences and the intersections of insider and outsider status in this study. I am a Master's student in Community Health and Epidemiology, and have also been trained in the positivist tradition with a Bachelors degree in Biology. Although I have lived my entire life in Canada, I straddle the two worlds of my two cultures as a visible minority of Chinese descent. My experiences traveling and volunteering in Southern countries as well as my social activism have had strong influences on my core values of equity and social justice. My first visit to Nicaragua was in 2009 for a Global Health field course, and I subsequently became involved in the research partnership through my thesis supervisor Dr. Hanson. My decision to undertake this project as my Master's thesis research was largely influenced by my desire to

conduct in research that was action-oriented and in solidarity with the ongoing efforts of local organizations. My past experiences in community development and participatory education oriented my approaches to research and to how I engaged the study participants and community.

The fact that I conducted research in a culture and environment remarkably different from my own requires particular attention to negotiating rigor and credibility for culturally competent research throughout the research process (Appendix 5). Negotiating the power differentials between the participants, the partner organization, and I was complex and evolving, and I openly shared my background and personal objectives in this project with the organizations and participants. The role of research partnership in this investigation also helped to lessen the hierarchies inherent in the research process.

3.5 Limitations and delimitations

One of the major limitations of this study is that the indicators could not be pilot-tested and the reliability of the indicators could not be assessed in this study. However, it is arguably more pertinent for an indicator to be valid than to be reliable, as an indicator that yields reliable and consistent scores may not necessarily be measuring what it intends to measure. The study methodology addressed issues of validity, and I have suggested additional indicators to inform future efforts to refine and improve the validity of the indicators. A second limitation arises from the large proportion of invited participants who could not attend the focus groups and who may have different views on gender equity. This potentially calls into question the ability of the proposed indicators to represent perspectives of the diverse members of the cooperative; however, the input of the gender specialist in the development of the indicators – who is the most familiar with the different circumstances of the women in PROCOCER – helped bring to light important issues affecting these women. Finally, Spanish is not my native language and, in spite of my language training, there may still be nuances that I may not fully understand, particularly in rural communities. I sought to address this limitation by enlisting the assistance of Nicaraguan counterparts during the focus groups, employing Nicaraguan research assistants to transcribe the data, and a native Spanish speaker to review the translated quotations used in the reporting of the results.

A significant delimitation in this study was the small sample of participants in this study.

The data was gathered in only two of the PROCOCER communities and, given the economic, social, and political diversity between the communities, this may affect the ability of the indicators to capture the breadth of issues affecting the PROCOCER membership (external validity). The multisectoral nature of PROCOCER, and the inclusion of participants who do not produce coffee make it difficult to establish direct correlations between the influence of FT on gender equity, particularly given the lack of awareness of the focus group participants around FT. The advances in gender equity within the cooperative must therefore be attributed to a combination of factors, only one of which is FT.

Chapter 4. Results

The primary purpose of this study was to develop an indicator set to measure gender equity in FT coffee cooperatives in Nicaragua. Through the process of data collection, however, it became apparent that the insights emerging from the participatory methods employed to this end were as important as the initial objective. This chapter is divided into two sections: the first will present the findings for the proposed indicator set for PROCOCER, and the second will offer reflections on the facilitating factors and challenges experienced in the participatory processes of this study.

The selection of the indicators (informed by methods outlined in Figure 6) was based on the key documents and data from the interviews and focus groups. Considerable challenges encountered in the PROCOCER interviews and focus groups resulted in data that was often sparse and superficial for some of the indicator concepts. Section 4.1 will therefore only focus on the indicator concepts where the data was more robust or complex. The complementary research findings on the participatory process of indicator development was informed by the same interview and focus group data as well as observations recorded in my field journal throughout the data collection process. Section 4.2 will present these findings in three broad categories: the interpretations of indicator development, the relational aspects of working within an emerging partnership, and the organizational aspects of PROCOCER.

This discussion focuses specifically on the experience of PROCOCER, and where verbal quotations from the data are presented, a pseudonym has been given to each participant, as well as for the names of other people and locations mentioned within these quotations. The three key informants from PROCOCER will be collectively referred to as the "leadership members" and the other two key informants who are not affiliated with PROCOCER as the "external key informants" (see Section 3.2.3.1). With the exception of the data from my field journal, which was written predominantly in English, quotations in this chapter have been translated from Spanish and the original text is included in Appendix 6.

4.1   The proposed gender equity indicators

This section will present the findings for the first research question: **what indicators best capture gender equity for the cooperative PROCOCER?** As the cooperative does not

yet have a clearly defined direction for gender programming nor a clear method of conducting its annual evaluations, this indicator set will serve as a tool for the gender specialist to guide efforts in identifying advances and priority areas where more attention and resources are needed. Despite the primarily economic objectives of PROCOCER, all of the key informants from the cooperative agreed that PROCOCER's programs and services could influence gender roles in the homes and communities of members as well. The indicator set is therefore structured around a modified version of Mayoux's Empowerment Framework (Figure 10).
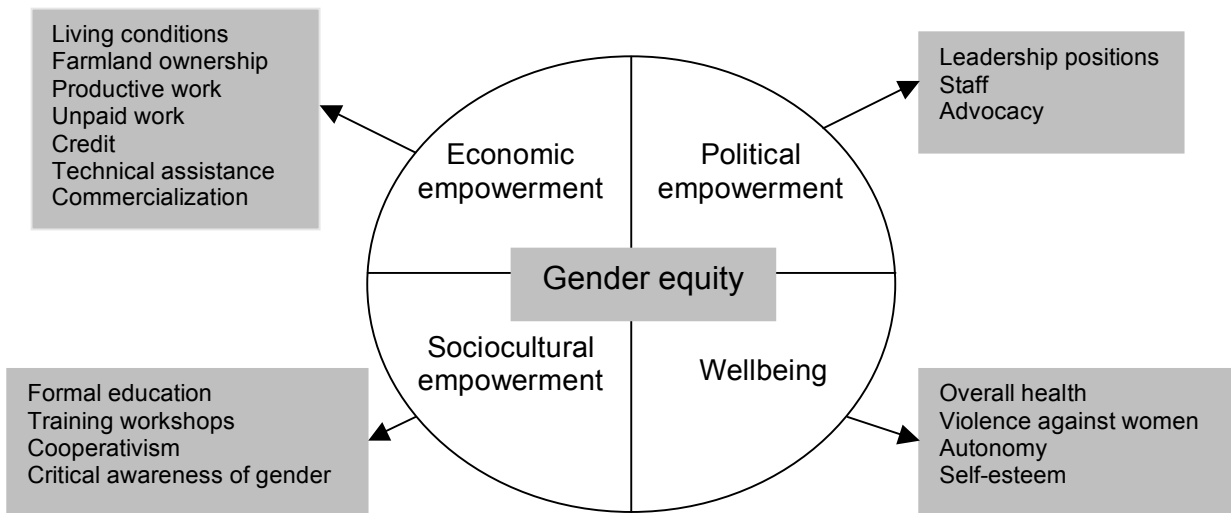
Figure 10. Conceptualization of gender equity in PROCOCER.

The four dimensions (Economic, Political, Sociocultural, and Wellbeing) are not meant to stand as isolated units; rather, each contains overlapping elements of the others, serving both as a means to triangulate the information measured by the indicators as well as illustrate the interrelated nature of the economic and non-economic spheres that can be influenced by PROCOCER. Given that empowerment involves personal and collective transformations in beliefs, values and relations of power, this study included both objective and subjective indicators to take into account the lived experiences of the members and the more nuanced and intangible concepts of empowerment. The proposed indicators emphasize outcome measures at the individual member and cooperative levels; however, where data is not available or in areas where the strategic planning of PROCOCER is not well developed, process indicators provide the next best alternative at this time.

In operationalizing the indicators, the indicators draw from PROCOCER's existing data sources where possible and, where data is unavailable for a concept, an indicator based on an existing measure in the literature was proposed, along with a suggested method of gathering the necessary information. The data required for the indicators will be drawn from three main sources of data:

> 1) *PROCOCER's developing socioeconomic database*: covers a range of economic, political, and social aspects of its entire membership, and will be updated every three years.

> 2) *A proposed in-depth survey to compliment PROCOCER's database*: to be applied to a representative sample of 10% of the membership.

> 3) *PROCOCER's registries*: maintained by different committees and management branches of the cooperative are not centralized in one system. They are updated on a regular basis.

PROCOCER had been seeking technical assistance to develop the socioeconomic database during my fieldwork, and Ganem-Cuenca and I supported this project by creating the survey questionnaire, collecting validity evidence for this questionnaire with the technical advisors of the cooperative, developing a workshop manual and training volunteers to administer the questionnaire, and training a volunteer to enter and analyze the data using Excel. In addition to addressing an important need for PROCOCER, the development of this database also provided a means to obtain the data (particularly the qualitative data) required of the gender equity indicators. I provided PROCOCER with suggestions for the in-depth questionnaire at the close of my fieldwork; however, the cooperative has yet to implement either of these surveys at the time of writing due to the absence of funding for this initiative.

The indicator set is comprised of 22 indicators for immediate use by PROCOCER, reflecting realistic assessments for the current status of gender work in the cooperative (Table 4). Since PROCOCER is in the early stages of developing a gender policy, 7 suggested indicators are proposed for future integration into the indicator set to allow for the evolving process of cooperative programming and improvements on available data sources. Although this thesis focuses on the process of selecting these indicators rather than the practical aspects of their implementation, knowledge translation is an integral component of this action-research study. To this end, I have submitted a separate report to PROCOCER in Spanish, which details

the proposed gender equity indicators, how they can be calculated, where to find the required data, what the indicators mean, and how they can be used. The following four sections will highlight the major findings for each of the four dimensions in the indicator set.

Table 4. Gender equity indicators for PROCOCER. The indicators are calculated for each member of PROCOCER at the end of each annual evaluation cycle. If there are 2 or more members per family, each member within the family is counted. The indicators in lower case are intended for immediate use by PROCOCER and the indicators in UPPER CASE are suggested as future additions.
W = Women, M = Men. Source: 1= socioeconomic database, 2 = in-depth survey, 3 = registries.

Dimension	Concept	Indicator	W	M	Other	Source
		Number of members			■	3
Economic	Living conditions	Average annual income from agricultural production for women members and for men members.				1
		Percentage of women members and men members who live in adequate housing conditions.[1]				1
	Farmland ownership	Average size of farmland for women members and for men members (*manzanas*).				1
		Percentage of women members and men members who have land titles in their name.				1
	Productive work	Percentage of women members who participate in women's productive programs[2] through PROCOCER.[3]			■	3
	Unpaid work	AVERAGE AMOUNT OF TIME SPENT IN UNPAID WORK[4] (MINUTES PER WEEK) FOR WOMEN MEMBERS AND FOR MEN MEMBERS.				2
	Credit	Percentage of women and men members who feel they have sufficient access to credit.				1
		Percentage of applications for PROCOCER credit approved in total, for women members and for men members.				3
	Technical assistance	Percentage of women and men members who feel "satisfied" or "very satisfied" with the frequency of technical assistance received.				1
		Percentage of women and men members who feel "satisfied" or "very satisfied" with the type of technical assistance received.				1
	Commercialization	Average number of workshops received on the sale and commercialization of products in PROCOCER for women members and for men members.[3]				1,3
		PERCENTAGE OF COFFEE SOLD ON THE FAIR TRADE MARKET BY THE WOMEN MEMBERS IN TOTAL AND BY THE MEN MEMBERS IN TOTAL.				3
Political	Leadership positions	Percentage of leadership positions in PROCOCER held by women members and by men members.				3
	Staff	Percentage of PROCOCER staff positions held by women and by men.				3
		Average number of gender workshops received per staff member per year.[3]				3
	Advocacy	PERCENTAGE OF WOMEN MEMBERS WHO PARTICIPATE IN THE ANNUAL MEETING OF THE *MOVIMIENTO DE MUJERES "FLORES DEL CAFÉ."*			■	3

Socio-cultural	Formal education	Percentage of women and men members who have basic literacy.[5]			■	1
		Percentage of PROCOCER scholarships awarded to women and to men.			■	3
	Training workshops	Average number of gender workshops attended per member.[3]			■	1,3
	Cooperativism	Percentage of the social premium budget invested in activities promoting the empowerment of women.[6]	■			3
	Critical awareness of gender	PERCENTAGE OF WOMEN AND MEN MEMBERS WHO HAVE A CRITICAL AWARENESS OF GENDER RELATIONS.[7]			■	2
Well-being	Overall health	Percentage of women and men members who self-rate their health as "good" or "very good."			■	1
		Number of programs offered by PROCOCER in women's sexual and reproductive health per year.[3]	■		■	3
	Violence against women	NUMBER OF WORKSHOPS GIVEN THROUGH PROCOCER ON VIOLENCE AGAINST WOMEN.[3]	■	■		3
	Autonomy	Percentage of women members who manage their own income.		■	■	1
		Percentage of higher leadership positions[8] in PROCOCER held by women members and by men members.		■		3
		PERCENTAGE OF WOMEN AND MEN MEMBERS WHO HAVE PARTICIPATED IN AN EXCHANGE THROUGH PROCOCER.[3]				1,3
	Self-esteem	Percentage of women and men members who feel they are "very" capable of assuming a leadership position in PROCOCER.				1
		PERCENTAGE OF WOMEN MEMBERS WHO TAKE THE PAPANICOLAOU EXAM EVERY TWO YEARS.		■	■	2

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[1] Living conditions are adequate if it has all of the following characteristics: a) a latrine or toilet, b) an accessible source of clean drinking water (requires less than 10 minutes to reach the water source), c) there are 3 or less people per bed, d) does not have a plastic roof for the house.

[2] GMAS, Economía de Patio (a small-scale crop and livestock production program), etc.

[3] Directly by PROCOCER and/or through alliances with other organizations.

[4] Includes a) domestic work: cleaning the house, preparing the meals, cleaning the dishes, washing and ironing the clothes, buying groceries, fetching water, and b) reproductive work: taking care of the children, elderly, and sick.

[5] Completed third grade or higher, or a literacy program.

[6] Social projects for women; training workshops in self-esteem, leadership, processes of negotiation and advocacy.

[7] The member is considered to have a critical awareness of gender if she/he answered "I do not agree" to all of the following phrases:
 a) The domestic work that is taught to the boys should be different than the domestic work taught to girls.
 b) Machismo is part of our culture and it should not be changed.
 c) The husband should make all the important family decisions.
 d) If a man hits a woman, it should be a matter between the couple and nobody should get involved.
 e) It should be the responsibility of the woman to prevent pregnancy.

[8] President, vice-president, or coordinator in all the leadership positions.

4.1.1 The economic dimension

The vast majority of the study findings concerned the economic dimension of gender equity, which is consistent with the dominant economic role of the cooperative. In addition to the production support provided by the cooperative with credit, technical assistance, and commercialization, this dimension also includes concepts related to the material and working conditions of the members (Table 5). The cooperative leaders spoke to the importance of assessing the living conditions of the women members while the focus group participants similarly ranked this aspect as one of their most important priorities. The issue of land ownership, while not directly suggested as an indicator by the leadership members, was frequently identified as a major obstacle impeding women's capacity for productive work and participation in the cooperative. The burden of unpaid domestic and reproductive work on women were discussed in all the interviews and focus groups, and has been included in the economic dimension in response to the recognition by some participants that this be considered a type of work (with some suggestions that women be compensated for this contribution to the household). As the evidence for the concepts land ownership, unpaid work, and credit, was particularly substantial, they will be outlined in greater detail in the following four sections.

The data suggests that women have minimal roles in and understanding of the commercialization processes of the cooperative and of FT, and the external key informants noted the importance of this knowledge in enabling women to have greater control over the value chain. Given that the cooperative is in the early stages to building this capacity among its members, an indicator on the number of workshops received in commercialization provides a realistic measure for current assessments. PROCOCER is also in the very early stages of developing a new brand of coffee produced only by women and to be sold on the international FT coffee market. In anticipation of this future project, an indicator comparing the percentage of coffee sold on the FT market between men and women members is suggested for future addition. When increased proportions of the coffee produced by women is sold to FT markets, this indicator illustrates – and can be used to inform initiatives to ensure – the equitable distribution of FT benefits to the women members to reflect their increased contributions to FT coffee sales. Given that women have traditionally faced considerable barriers to market access in agricultural production, it is important to note that parity between the two percentages may

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not necessarily signal that equity has been "achieved", nor does a higher percentage among women members than men members signify inequity.

Table 5. Gender equity indicator concepts for the economic dimension.

Indicator concept	Definition
Living conditions	The material resources of the member, represented by income and access to basic necessities (ie. clean drinking water, sanitation).
Land ownership	The member's productive farmland.
Productive work	Agricultural and non-agricultural production to generate income.
Unpaid work	Domestic work in the home, including household tasks (ie. food preparation, cleaning) and reproductive tasks (ie. child-rearing, caring for elderly and sick family members).
Credit	Credit loans offered through PROCOCER.
Technical assistance	Supervision provided by the PROCOCER agricultural advisors in all types of agricultural production.
Commercialization	The sale and marketing of products through PROCOCER to national and international markets. Commercialization is not limited to coffee and includes other agricultural products sold through the cooperative.

4.1.1.1 Land ownership

Possession of farmland has considerable significance both as a material requisite for agricultural production as well as gaining access to productive and cooperative resources. In the words of one key informant, "…to have land as a farmer is to have life," and it provides the primary material for income-generation, serves as collateral to obtain credit, and is a criteria for leadership positions in the cooperative. The issue of land ownership arose in many interviews as a key impediment to women's participation in the cooperative, as Marlyn pointed out, "it is rare, a woman who… possesses land." There is a lack of agreement in the data regarding whether access to land is required to become a member of PROCOCER between the leadership members and there is no written explanation among the key documents in my possession.

Land ownership also carries an important strategic purpose for women. Some of the focus group participants spoke to the fundamental role of land in facilitating the independence and autonomy of women. Lucila, a landowner and single mother, described the role of land in giving her greater control over her life,

> …it isn't like in some other cases where maybe the husband is living,
> right, but the woman doesn't have any decision making power, the man
> does. The man has the land title, the man is the one who harvests the

coffee, the man sells it and like this, the woman only helps him in the work. But in my case I feel at peace because I am the one who controls my work. I am the owner of my land, my house. I feel good.

Other participants echoed sentiments of the importance of land, with Natalia highlighting the role of cooperatives in facilitating women's access to land, "…through the cooperatives […] we have arrived at what we want: our own land."

The means available to women for owning land is complicated. In PROCOCER, many of the women have access to family plots of land that are assigned to them by the family member who holds the official land title. This practice of assigning a plot of the farmland usually happens by way of oral agreement, which is not equivalent to a legal title. The findings in this thesis suggest that the cooperative's strategy is focused more on raising awareness of this issue among the members and encouraging the men to assign land to their wives, although there does not appear to be an official strategy. An external key informant, Josefina, argued "…the assignation [of land] doesn't guarantee the right to land. At any time, [the man] can take it back again because he has the legal document." The data from MMFC documents and external informant interviews outline other means to promote women's legal procurement of land, such as campaigns to change the cultural practice of male inheritance to include both sons and daughters as heirs to the farmland, offering credit loans for the purchase of land, and assisting women who have assigned land to go through the legal process to obtain the official title. Encouraging men to include their partners' name in the land title is another possibility, though it may not address the gender power relations in control over the land. Despite the lack of a clear policy towards increasing women's access to land in PROCOCER, its Gender Strategy recommends in C.5 the "negotiation with the state for the legalization of the land title so that it can serve as collateral for the producers (men and women)." (104) An indicator comparing the average size of farmland between women and men members (of both assigned and legally owned property) will therefore be complimented by a comparison of the number of women to men who have official land titles, in order to underline the vital importance of full legal ownership.

4.1.1.2 Unpaid work

The sexual division of labor in the home was a recurring theme in the data, and key informants and producers alike identified the inequitable burden on women as one of the major factors that limit their ability to fully participate in the services offered by the cooperative. Two active members of the cooperative explained,

> Natalia: …before when I had my small children, I didn't go out to work or to the meetings because who was going to take care of them for me? And now I work and I go out because I don't have small children anymore.
>
> Nina: I say if we had small children we would not have come.
>
> Natalia: We would not have come. When? We would not have found anyone to look after them.

That less than half of the invited women arrived to participate in the focus groups in this study is a case in point. In the first focus group, the participants surmised that many of the women could not attend because they were caring for their children who were sick from the vaccinations they were given the day before. At least one participant in every focus group brought along their young children. The participants who have partners appear to face the same burden of child-rearing responsibilities as the single mothers.

When the participants of the focus groups shared their views on what gender equity in the home looks like to them, some expressed a desire that their labor merely be valued by the men. Other participants wished that men would help them do some of the household tasks, as Elena expressed,

> …when there is gender equity, if the man came home from work and there is a need to maybe help clean a pound of beans for the woman, he does it. But sometimes it's no use; I think they don't help them.

Lucila made stronger demands,

> …if there is gender equity, then it means that the man can do the work that the woman does as well. Because this is equity, sharing the chores, right, because if I am a woman, I can do the chores of the house, I can do the chores of the fields. The man also can do the chores of the house, he can do the chores of the fields as well. So it's a part of gender equity as well. Sharing the chores of the house.

The leadership members of PROCOCER, while recognizing that domestic work was a major barrier to women's participation, showed mixed impetus towards addressing this issue. One informant referred to the burden of housework on women as "human nature," another felt that "in the long-term […] it can be changed. Not completely but in some cases," while yet another believed that changing this unfair division of labor "is hard work but it must be done." In PROCOCER's Strategy, the only mention of unpaid work is under D.1, proposing a gender policy that "…the valorization of the contribution of the women in the sphere of the family unit is promoted between men and women members." (104) Beyond this recommendation, there does not appear to be a coherent strategy on how to address this challenge in the cooperative. Despite the lack of clear commitment, the frequency with which this issue was raised in the data impels attention to this issue in the future, and a measure of unpaid work is a suggested as a future addition to the indicator set. Although the women members presented diverse conceptualizations of gender equity in this sphere, the comparison of the time spent on these tasks between men and women members would not restrict the assessment to a singular definition of equity.

4.1.1.3 Credit

The participants overwhelmingly identified the low-interest credit provided by PROCOCER as one of the most important benefits they received from the cooperative, as one coffee producer stressed, "…without credit one can't work. They lose their farms if there isn't credit..." In discussing gender equity, PROCOCER leadership members repeatedly emphasized that the cooperative offers credit without discrimination based on sex and that all women members have the opportunity to obtain credit. Such unrestricted access to credit among women is regarded as a significant advance in itself, as few women have access to the types of collateral traditionally required for loans, such as a legal land title. PROCOCER is currently offering credit loans with more flexible collateral requirements; the gender specialist described one credit program for women that only require a guarantor. All applications for credit loans from PROCOCER are approved or rejected by the cooperative's Credit Committee (composed of 3 elected cooperative members), and an indicator on the percentage of approved applications

would enable a comparison between women and men members' abilities to meet the requirements of the credit loans.

The leadership members suggested the inclusion of an indicator measuring the number of women who have a credit loan, however, counting the number of women with access to credit may not provide sufficient depth of information for the purposes of gender equity. Gioconda, an external key informant, pointed out that,

> …because often in the credit services, they say, 'no, we have a gender focus and so we give credit loans to women.' But when you look at the credit portfolio, the larger invested sums are with the men. Although they have […] a thousand credit loans with women but they have five credit loans [with men] that surpass the invested sum in these thousand women. So, where is the gender equity?

PROCOCER's gender specialist disagreed, explaining that,

> I ask for a credit [loan] according to what my capacity of payment is and according to what I need. A person who has one *manzana* [of land] is not going to need 80,000 *pesos*[21] but needs 5,000. So depending on what I have, what I farm, this is [the size of] the loan.

Nevertheless, the size of the credit loan does appear to be a concern among the women members of the cooperative. Natalia remarked in a focus group, "there is almost no capacity for credit. They give us maybe a quarter of what one asks for. That is what we need the most…" The final selected indicator therefore relies on a subjective measure of whether the member feels they have sufficient access to credit, allowing for an examination of the extent to which the different credit needs of women and men members are satisfied. The disadvantage of this indicator is that the necessary information is only available every three years, as it will be drawn from PROCOCER's socioeconomic database. However, complimenting this measure with the other credit indicator, which is continuously updated by the Credit Committee, will provide a more timely measure.

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[21] 1 Canadian dollar equals about 21 Córdobas (which Nicaraguans also call *pesos)*.

4.1.2 The political dimension

This dimension is composed of aspects pertaining to the organization and administration of PROCOCER, including assessments of gender equity among the leadership and staff, as well as broader community involvement in advocacy and decision-making (Table 6). The PROCOCER leadership members most frequently cite the paucity of women in decision-making positions as the main difference between the participation of women and men members in the cooperative. The findings reveal a multitude of reasons to explain the lack of women in these spaces, and the external key informants in particular emphasized the crucial role of the cooperative staff in promoting women's participation. The Advocacy concept was not encountered in the data from the PROCOCER participants and was only directly raised by the external key informants. Josefina explained that, "…PROCOCER can resolve a part of their demands, their interests. But [the women] need other contacts to develop themselves, to empower themselves, to reach these same gender indicators." Although PROCOCER has limited capacity to measure women's involvements in other organizations, PROCOCER's gender specialist is hoping to integrate greater numbers of the cooperative's women into the MMFC, and this can provide a realistic proxy measure for community participation. As the Leadership and Staff concepts generated particularly lengthy discussions in the findings, they will be explored in greater depth in the following sections.

Table 6. Gender equity indicator concepts for the political dimension.

Indicator concept	Definition
Leadership positions	Elected positions in all of the organizational committees of PROCOCER (excludes paid staff): Administrative Council, Delegate, Education Committee, Credit Committee, Gender Committee, Finance Committee, Surveillance Committee, Inspection.
Staff	Personnel employed by PROCOCER in Administration, Management, Technical assistance, Warehouse, Coffee tasting, Housekeeping, Security.
Advocacy	Participation of members in governmental and civil society organizations outside of PROCOCER that advocate for gender equity and women's rights.

4.1.2.1 Leadership positions

All of the leadership members of PROCOCER acknowledge the lack of political participation from women in the cooperative, although they are quick to point out that there is no discrimination against women: "there aren't any differences, be it a man or a woman, they can participate." On the other hand, their conceptualizations of what gender equity in the leadership looks like are rather diverse. In the words of one PROCOCER key informant, the cooperative is in the process of "inserting" women into leadership positions in the cooperative, and each key informant cited different goals for the target number of women in these positions: from two women in each committee to 50% women in all the positions. PROCOCER's Strategy further muddles these ambiguous objectives by proposing a model of affirmative action for women in decision-making spaces – an approach that is also promoted by MMFC – although a key informant denied plans for any type of quotas in the cooperative. The selected indicator of the proportion of women in leadership spaces in the cooperative will therefore measure progress in this area regardless of PROCOCER's strategic objectives for what gender equity means. Ironically, there was more clarity among the focus group participants towards the importance of women in decision-making spaces: Lucila stated simply, "it has to be 50% women."

Natalia is the only participant who holds a leadership position in the cooperative, and while some of the others expressed interest in taking on a position, they did not appear to have ever considered it a real possibility. The reasons for this can be grouped into three main factors: not possessing the necessary "capacity" for a leadership position, not having the free time to take on a position, and a lack of confidence. The participants generally used the term "capacity" in reference to literacy and educational levels, although it was sometimes referred to in terms of leadership skills. This was the most common reason given among the focus group participants:

> Massiel: … as for my part, a big leadership position, I don't get one because of my difficulty with letters or with knowledge, I barely have second grade [education].
>
> Nina: Yes, because… it's true that [the cooperative] isn't going put a person in who doesn't have the capacity.
>
> Natalia: Yes, doesn't have the capacity.
>
> Nina: The capacity that [Natalia] has, I don't have.

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Natalia: Nor does [Massiel] have it.

Leadership and cooperative members alike cited the significant amount of time women spend on domestic and reproductive responsibilities as a major limitation on their ability to more actively participate in the leadership positions:

Jannie: …what things limit your participation in PROCOCER's leadership positions?

Marlyn: For you to be, for example, a delegate, director…

Elena: Nothing, only to be available because one has to be available to go get trained […] It seems to me that this is the most laborious...

Finally, some of the leadership members explained that many of the women are afraid to take on leadership positions because they doubt their abilities or they worry about doing a bad job. Marlyn explained, "…more than anything, the women decide sometimes not to take the risk so that they won't do a bad job in these decision-making positions." Less frequent explanations include stereotypes that women belong in the home and cannot be organized and the lack of promotion of the available positions to the women members.

These explanations reveal the deeper structural and sociocultural barriers that cannot merely be resolved by "inserting" women in decision-making spaces. Although many of the indicators in this set overlap in scope, this indicator is highly correlated with the other indicators of education, unpaid work, and self-esteem. As such, an indicator comparing the number of men and women in leadership positions will provide a standard measure of women's participation, which will be complimented by indicators in the other dimensions for an examination into the root causes that prevent greater political participation among women.

4.1.2.2 Staff

Although the focus of this indicator set is gender equity for the members of PROCOCER, many of the key informants proposed that the cooperative staff have vital roles to play in providing not only an enabling environment for gender equity, but also promoting the empowerment of women and driving change from within the organizational culture. A number of participants commented on the influence of *machismo* on employment opportunities for

women, as Marlyn described, "it is one of the gaps that we have, that they say, 'women can't be engineers, it is men's work. Women can only be secretaries.'" At a later interview, she added that, while cooperative members could also potentially work in PROCOCER, the specialized training required for many of the staff positions in PROCOCER, such as for the agricultural advisors and *catadores* (coffee tasters), prevents them from doing so. Among the staff at the PROCOCER office, only three are women and all, except for the gender specialist, are employed in traditionally female roles: a cashier and housekeeper. An indicator on the gender composition of the staff would reveal the impetus of the organization to promote women in non-traditional positions, such as in management or technical assistance, particularly given the potential of PROCOCER's scholarship program to alter the traditional gender stereotypes in education.

Another theme in the data called for a critical awareness of gender in the men and even the women staff. Marlyn explained that hiring more women in staff and leadership positions does not guarantee that these women will be aware of gender injustices: "…we have men in the Board of Directors that yes, are concerned about the women. And sometimes we can have women […] and they are not concerned about us women." Gioconda, an external informant, further explained that many women, brought up in the culture of *machismo*, also maintain the patriarchal structures in the same way men do:

> …there is a culture in the women technical advisors, in the women agronomists, in the women administrators, in the women colleagues… also very patriarchal. So the women technical agronomists go to the farms and the woman member is the beneficiary, but the person they talk to is the husband of the woman member. […] 'Is Mr. Fulano here? I want us to go look at the coffee,' for example. And they direct themselves to the husband of the woman member and not to her. 'Bring me a cup of coffee, Mrs. Fulana? How have you been? And the children? And how have they been?' […] And they see her only through her reproductive work. And they relate themselves with her, woman to woman, only at the level of reproductive work and not as a woman member capable of controlling her resources.

Josefina, another external informant, recounted a similar scenario in a separate interview, suggesting that this is a common occurrence among women producers. This evidence highlights the role of the cooperative staff as key facilitators in the process of empowering women. A

leadership member assured me that the staff have received gender training workshops, and the proposed indicator therefore measures the average number of gender workshops attended per staff as part of a continual process towards raising awareness of these gender inequities to challenge oppressive practices.

4.1.3 The sociocultural dimension

In the findings, there was a common reference to *machismo* and other sociocultural norms as one of the main causes of gender inequities, and the participants underlined the role of education and cooperativism in promoting change. The sociocultural dimension is bound by aspects that are relevant to and can be influenced by PROCOCER (Table 7), from tangible concepts of Formal education and Training workshops (which will be explained in greater detail in the following two sections) to abstract subjective concepts of Cooperativism and Critical awareness of gender. The participants referred to the role of cooperativism in enabling couples to work together and to work equally in the face of obstacles, "because union gives us strength." Among the cooperative members, the concept of cooperativism facilitates collective action towards a common goal, in this case gender equity. Choosing an indicator to represent this concept is challenging, and the percentage of the FT social premium dedicated towards initiatives for the empowerment of women provides a proxy measure. FT criteria require a democratic process in the cooperative to decide where to invest the social premium; in the case of PROCOCER, it is by vote in the annual delegates assembly. As such, the percentage of resources the members dedicate to addressing the needs of women in their community is an indicator of the priority the cooperative members place on gender equity.

Finally, a measure of the critical awareness of gender among the members will provide one means of assessing the effectiveness of these actions. Gioconda, an external informant, introduced this concept and defined it as when the members "…see that it is unjust that the women aren't participating and they make it public." Although it is difficult to obtain valid sources of data for this subjective measure, survey questions directed to the members around their values and opinions of gender roles provides one means to assess changes in their critical awareness. I initially selected five such questions based on the level of awareness of gender issues I observed among the participants of the focus groups and based on the literature, which

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the key informants have reviewed and modified (Table 4). As PROCOCER does not have current plans to collect this information, this measure has been suggested as a future addition to the proposed in-depth questionnaire that will be appended to the existing database.

Table 7. Gender equity indicator concepts for the sociocultural dimension.

Indicator concept	Definition
Formal education	The literacy and educational level of the members and the educational resources offered by PROCOCER to the members and their families.
Training workshops	Training workshops offered directly by PROCOCER or with the support of another organization.
Cooperativism	Mutual support and collective action by cooperative members to promote the empowerment of women in the cooperative and communities of PROCOCER members.
Critical awareness of gender	The member's level of awareness of gender inequities in the cooperative, their home, and community; recognizing and challenging gender inequities.

4.1.3.1 Formal education

Although the majority of the focus group participants were not able to complete primary education and have difficulties with literacy, all placed a high value on education. The experience of Jitzy in formal education seems fairly typical of women in this region:

> I don't know how to read, I don't know anything. […] I was not in any school […] because in the time that I grew up, I grew up in a mountain and there weren't teachers. Those that put their children in school, they were those that paid private teachers in their homes so that they taught them to read. We didn't have this […] help, right, to be able to study.

Although most expressed a desire to learn, these women rarely spoke about pursuing their own educational goals; they all emphasized their children's education as one of the most important priorities in their lives:

> Nina: My dream is to educate my daughter. As far as she wants to study.

> Natalia: Me, too. The only one who liked to study was Darling. […] I am going to give her education until I die.

The cooperative's scholarship program is frequently discussed among the leadership members as one of their major initiatives to improve gender equity. Of the thirty scholarships granted each year, the majority of the recipients are the children of cooperative members, though they

have also been granted to wives of members and even to some of the members themselves. The focus group data suggest that the scholarship program is one of the most important benefits for the members, although several of the participants talked about the difficulty in obtaining a scholarship: "That scholarship is impossible. I am old to be asking for it." The PROCOCER leaders proposed the proportion of women scholarship recipients as an important indicator for the organization. Marlyn pointed out that traditionally, "the men have been more educated than the women," and in the focus groups, many participants spoke to the historical barriers to educational opportunities for women, where some families give greater priority to educating sons over daughters, or husbands that prohibit their wives from going to school. The MMFC Strategic Plan recommends that the cooperatives grant 60% of the scholarships to women (100) and an indicator on the proportion of women scholarship recipients in the program will highlight this need.

The participants frequently identified their challenges with literacy as the main barrier to their active participation in the cooperative. Beyond the importance of literacy for leadership positions, knowing to read and write is required to fill out credit applications and often for meetings and workshops. In my observations, PROCOCER attempts to prevent illiteracy from being a barrier to participation by helping members fill out credit applications and adapting their workshops to accommodate all literacy levels. Many of the members also rely on family members to assist them with these tasks. However, these efforts only circumvent the educational disadvantages of the members, and literacy continues to be a barrier to women's full participation in the cooperative. The data reveals that education is both a practical resource for greater economic and political participation as well as a strategic resource for self-esteem and status.

Apart from the women producers in the focus groups, the leadership members did not raise the issue of illiteracy among its members in the interviews. D.9 of PROCOCER's Gender Equity Strategy calls for "…a literacy plan to diminish by half the functional illiteracy among the men and women members through the establishment of an alliance with MECD [Ministry of Education, Culture and Sports]." (104) MECD currently runs a literacy program called *Yo Sí Puedo* (Yes I Can) throughout the country, and the cooperative has been involved in this initiative by encouraging cooperative members and their children to volunteer as educators.

Although there are no clear plans by PROCOCER to address the issue of literacy, the significant role of illiteracy in inhibiting active participation suggests the need for an indicator assessing the literacy level of PROCOCER members and more importantly, potential changes in these levels.

4.1.3.2 Training workshops

In additional to their children's educational goals, the focus group participants expressed great enthusiasm for the knowledge they have gained from the non-formal educational opportunities of the cooperative, particularly with the training workshops. The wide range of workshops offered through PROCOCER serves not only as a means for disseminating practical information on topics such as organic farming techniques and financial management, but also provides the principle means of personal development and raising awareness around social issues. "…PROCOCER maintains a dynamic of the *permanent* strengthening of capacities. Here we are giving workshops to the people almost daily…" explained a PROCOCER leader and past member of the Education Committee. The workshops appear to focus on themes of agricultural production and financial literacy, with the objective of developing the members' capacity for greater participation in the cooperative. A leadership member expressed dissatisfaction at one of the gender workshops offered through the cooperative that explored the differences between sex and gender, explaining that it was not conducive to cooperative objectives. And while the gender specialist affirmed that, "…in the workshops […] there is a transversal focus of gender equity in PROCOCER. In all the workshops, there is a little bit of gender equity," few of the workshops offered through the cooperative have specifically addressed issues of gender equity and the empowerment of women.

Nonetheless, there appears to be an impetus for more gender workshops covering themes beyond the narrow mandate of the cooperative. MMFC's Strategic Plan calls for workshops to develop the leadership skills of women and the movement has initiated the *Escuela de Liderezas*, a leadership "school" to train women in a wide range of themes for the empowerment of women such as women's rights and advocacy skills through participatory workshops. PROCOCER's gender specialist is undergoing training in this school, and she is required to replicate the training for women in her community. Additionally, a male leadership

member of PROCOCER spoke of the need for workshops in masculinity, recounting his experience with one such workshop (offered by a different cooperative), in which he humbly commented, "It's hard for the men, but it must be done."

Many of the focus group participants identified the workshops as an important means in promoting gender equity, and a frequent complaint among the women members was the lack of interest on the part of the men to attend these workshops unless it involves monetary incentives, an observation that was confirmed by the leadership members. Nina pointed out, "…because in gender, it's no use to give and give workshops to the women and the men nothing." A comparison between the number of gender workshops attended by women and men members will provide an indication of both the participation of men in gender training as well as the number of gender-specific themes being covered in the workshop.

4.1.4 Well-being

Although there was a relatively small amount of data for this dimension compared to the others, the external key informants particularly emphasized its importance for the process of empowerment. The concepts in this section (Table 8) were rarely referenced directly by the participants; rather, they emerged as themes from my preliminary data analysis in Stage 2. The area of health was only generally mentioned by a few of the PROCOCER participants, and the data for violence against women was even more scant. Josefina, one of the external key informants, argued that sexual and reproductive health and violence are fundamental themes when discussing gender equity, congruent with my observations of the frequency with which domestic abuse issues came up in conversations and local gossip in the PROCOCER communities. While the PROCOCER gender specialist was reluctant to include violence as an indicator because the cooperative is not currently working in this area, she also admitted its importance for gender equity, and a suggested indicator has therefore been proposed for future integration.

The majority of the participants of PROCOCER viewed self-esteem as an enabling factor for greater political and economic participation. Some of the focus group participants commented on the importance of the cooperative in giving them a sense of motivation and confidence to continue their work, and educational level heavily influenced the participants'

perception of their abilities to take on leadership positions. Marlyn noted, "…if we have a woman with good self-esteem […] I think that she has the power to participate, the power to make decisions, is apart from something, something oppressed," and a subjective measure to assess the women's valuation of their capabilities is an important indicator of empowerment. Beyond the functional significance of self-esteem as a means to promote greater participation, the external key informants also underlined the importance of self-esteem as an end, where women attend to their own needs. Josefina suggested the number of women who take the Papanicolaou exam as an indicator of self-esteem,

> …because it has to do also with how you are attending to your health… if you have high self-esteem, you are concerned for your health. You are the priority, not your sons and daughters.

This proposed indicator is consistent with the cooperative's initiatives in women's health and can serve the dual purposes of addressing both of these issues. The area Autonomy was more frequently discussed in the data, and a detailed exploration of the multiple interpretations of this concept will be presented in the following section.

Table 8. Gender equity indicator concepts for the well-being dimension.

Indicator concept	Definition
Overall health	The physical, mental, emotional health of the members with particular attention to women's sexual and reproductive health.
Violence against women	All forms of abuse experienced by women members of the cooperative.
Autonomy	The members' capacity to exercise control over the personal, economic, and political resources in their lives.
Self-esteem	The members' level of self-confidence and self-valuation.

4.1.4.1 Autonomy

The majority of the participants alluded to autonomy in some way, although different terms were used to describe this concept, such as independence and control. The varied descriptions of autonomy in the data speak to the diverse ways in which it can be exercised. The three proxy measures in the indicator set represent the multifaceted nature of autonomy and are grouped into three broad areas that arose from the findings: control over financial resources

(economic autonomy), decision-making (political autonomy), and freedom of mobility (personal autonomy).

The issue of economic autonomy generated relatively fewer discussions among the focus group participants; when I asked who makes the decisions around how money in the household is spent, the majority replied that they did. While it is not a major concern for the women producers who participated in this study, there is some evidence among the key informant interviews, however, to suggest that it is an issue in other households. Marlyn claimed that generally the men manage the money in the household, even the women's earnings. Other key informants described instances where the woman receives a credit loan but the husband takes it away from her and spends it on other things such as alcohol. Carlos, a leadership member of PROCOCER, stressed the need to raise awareness among the women that these resources are theirs to control. Gioconda highlighted the cooperative's role in this process, that "the financial service *in itself* doesn't empower women" and that the other services of the cooperative need to build women's capacity and technical knowledge to administer their own resources. An indicator of the proportion of women cooperative members who administer their own income provides one measure of the level of economic autonomy they exercise.

The focus group participants more commonly defined autonomy in terms of making their own decisions in the home. In response to the question of what gender equity looks like in the home, many referred to equality in decision-making between the husband and wife, that "there is control from both of them." The participants recounted numerous examples of other women who have little autonomy in the home:

> Jitzy: There are men who get involved in the home for as little as a chicken's egg.
>
> Massiel: Yes, it's true.
>
> Jitzy: […] maybe someone arrives to look for something, and [the wife] tells him, 'no, my husband isn't here, I can't sell an egg nor a chicken.'
>
> Carmen: Yes, 'until he comes back,' they say.

Although there is no available data to assess the share of decision-making in the household, a survey question on this issue is included within the measure for the concept Critical awareness

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of gender (Table 4). From the perspective of PROCOCER, a measure of women's share of decision-making in the organization is a more suitable indicator that can be directly influenced by the cooperative. Josefina suggested that, in addition to a measure of the number of women in leadership positions, an important question to ask is whether women share the important decisions that are being made in the cooperative. An indicator on the proportion of women in higher leadership positions (president and vice-president in the committees) can help shed light on women's access to greater decision-making power.

In addition to the structural barriers preventing the greater participation of women in the cooperative described in the previous sections, another explanation from the participants was that some women have to ask permission from their husbands to leave the house for a meeting or workshop; if he refuses, the woman stays at home. A woman member claimed, "the majority of the men don't like their women going out." The data from the key informant interviews concur with this finding. Carlos, for example, recalled situations where men did not allow their wives to get treatment when they were ill. Some of the participants described that one of the changes they have experienced in their lives since joining PROCOCER is that they now leave the house more. Yeni, a coproducer, attributed these changes to women having their own employment:

> At least my mom never […] says where she goes even though my dad is at home. She takes her wallet, showers, and leaves. 'And your mom?' God knows where she is! That's what happens when a woman has her work, […] she knows what her responsibilities are, and when she isn't used to taking care of her husband, she has to watch over her own things.

Despite these gains in autonomy within the household, she still noted the prevailing cultural restrictions around women's mobility: "…even though they are from one community, but the man goes where he wants to […] while the women, they have always kept us [in the home] like this." Given the lack of data on women's mobility, a proxy measure of the number of women who participate in exchanges can provide an indication of women's ability to step outside of their communities.

4.1.5 Summary

The results of this section represent a strategic balance between ideal possibilities for gender equity and realistic expectations of PROCOCER. Some of the themes that emerged from the data, though important for gender equity, could not be included in the indicator set, such as the contributions and distribution of benefits to coproducers and the relationship between environmental sustainability and gender equity. The following section will build on these findings with observations on the broader context of this investigation and the actors involved in influencing this strategic balance.

4.2 Participatory indicator development

The participatory orientation of the study methodology meant that the selection of the indicators was inherently shaped by the dynamics of PROCOCER as an organization, the trajectory of gender work undertaken by the organization, and the developing relationship between PROCOCER and I. These factors further interacted with the level of gender consciousness in PROCOCER leadership and members, affecting how the concept gender equity is conceptualized and operationalized in cooperative functioning and in the lives of the members. This section will present the findings for the second research question: **what lessons can be learned about the process of participatory indicator development for a complex social construct such as gender equity?** I will begin by discussing the diversity of interpretations in indicator development, continue with observations of PROCOCER's organizational environment, examine the influences of my emerging research partnership with this cooperative, and finally consider the challenges encountered in defining gender equity among the leadership and members.

4.2.1 Diversity of terms and interpretations of indicators

One of the difficulties encountered in this study was the lack of a consistent understanding between the participants and I around what indicators are, how they will be used, and how they are developed. Indicators are quite widely applied in Nicaragua, and the majority of FT organizations in Nicaragua include indicators in their strategic plans. How indicators are used in the organizations, however, differs significantly from the type of indicators found in the

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academic literature. Gioconda, an external key informant, supported my observations, alleging that despite the extensive usage of indicators, few people in these organizations have a clear understanding of what indicators are or how to develop them properly. The indicators from the key documents gathered for this study consist of numerical strategic targets to direct program planning. For example, in PROCOCER's 2008-2010 Strategic Plan (101), two of the indicators to assess the capitalization of the cooperative (Objective 1.3) read, "5 economic activities implemented by the cooperative" and "Increasing the volume of the sale of ground coffee to 8,000 pounds." (p.15) Similarly, in MMFC's Strategic Plan (100), an indicator for the promotion of land ownership for women reads, "By 2013, MMFC will have realized at least one campaign in 100% of the Cafénica organizations." (p.20) The numerical targets suggest that these indicators function as projected outcomes for the specified time period, more resembling programming objectives (108) that the indicators are subsequently designed to measure. Conventional indicators encountered in the academic literature typically take the form of ratios (19,115,119), Likert-type scales (which are often adapted from qualitative information) (129,139), and measures of quantity (19) that are assessed over different periods of time or between different populations to assess changes (108). That participatory methods are rarely employed in the development of these indicators raise important questions about their appropriateness to non-academic contexts.

Furthermore, the data suggests that these organizations evaluate their selected indicators in diverse ways that contrasted my academic conceptualizations of validity. In my interviews to validate the draft indicator set, the PROCOCER leadership members were disproportionately concerned with the availability of data for the indicator in question rather than the relevance of the indicator or the other indicator criteria. For example, Marlyn did not want to include an indicator on family planning because of the lack of credibility of the available data,

> Marlyn: I say that doesn't go because […] they are not going to give the information.
>
> Jannie: But with the questionnaire [of the PROCOCER database], it doesn't…?
>
> Marlyn: It's that I don't think that they give true information.
>
> Jannie: They aren't going to write the true response?

Marlyn: I don't think so.

She later agreed that family planning was something PROCOCER can influence in their work; however, given the difficulties with the data source, I removed the indicator concept on family planning and instead included it as a survey question in the measure of Critical awareness of gender (see Table 4). This exchange also speaks to the different interpretations of validity in different contexts, as Marlyn's concern for the credibility of the data source is an important aspect of validity testing.

This process was even more challenging for the producers and co-producers of the focus groups, who had no previous experience with indicators. Although we held brief discussions around what indicators are and their use in PROCOCER, it still remained very much an abstract and intangible concept for them. While the participants provided considerable feedback of the indicator concepts, which they could discuss in the context of their lives and their involvement with the cooperative, there was a lot of confusion in evaluating the specific indicators, which requires more background knowledge on indicator development and use. I observed in my field journal,

> I think they understood the concept of indicators and why they are
> important, but in terms of deciding whether an indicator was good or bad,
> I think they weren't familiar enough with the objective (gender equity) or
> about the other possibilities to be able to decide if it was good or bad.
> They all gave the few indicators I presented top scores.

As Barahona et al. (175) point out, "how people acquire, process and use information is linked with the way they interpret the world, with the philosophy that underlies their system of analysis." (p.165) The sociocultural context of this study also relates to the ways in which the participants view the world, which, for these farmers, may include different cosmovisions[22] (176) guided by their relationship with nature, contrasting the linearity of thinking guided by empirical-analytic approaches in Western education that I employed to evaluate the indicators. These differences in worldview influenced the extent to which the participants could contribute

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[22] Used here to refer to "a particular view or understanding of the world, [especially] the view of time and space and its ritualized representation and enactment by Mesoamerican peoples." (176)

to the development of the indicators using this study design, as did the organizational functioning of PROCOCER, which I turn to next.

4.2.2 The organization PROCOCER

Although this research study had been conceived by a collaborative partnership, which includes PROCOCER, the interplay of actors and the evolving relationship within this negotiated space dictated how the research methodology was carried out in this context and exerted considerable influence on how the results of the study have been framed. The ensuing discussion will present my observations on the operational aspects of the cooperative that had an effect on the course of this investigation.

4.2.2.1 Organizational counterpart

Marlyn, the gender specialist of PROCOCER was my counterpart for this project and helped to facilitate my entry into the cooperative and my relationship with the cooperative leadership and members. In addition to her role in collaborating on study methods and instruments, she also oversaw the logistical aspects of data collection, contacting potential participants and arranging meeting spaces. One of her most important roles in this study was to act as a liaison between the participants, the cooperative and I, as she best understands the cultural context of the women producers and the organizational functioning of the cooperative. In the focus groups, she provided an invaluable cultural and linguistic bridge between the participants and I, often rephrasing my questions in a way that the women could better understand and suggesting examples where organizational terms were unclear. Most importantly, her personable and trusting relationship with the women producers helped to put them at ease and foster their trust in me as a foreigner and outsider.

In my working relationship with Marlyn, she seemed to view her role in this study as primarily providing logistical supports. I recorded in my field journal that, "a lot of times I felt like I was selling my idea to Marlyn, like I needed to convince her of how it would be useful to her, rather than us working on it together" and that she regarded her participation in this study as yet another task added to her already teeming list of responsibilities. And despite my continued efforts to foster a trusting relationship, I sensed that she never felt fully comfortable

contradicting me in our interactions. In our final interview to validate the draft indicators, she responded with silence to some of my questions on her opinions of certain indicators. When I probed her silence on one occasion, she finally expressed her objections to the indicator. These findings speak to the capacity for collaboration with my organizational counterpart over the development of this study, issues that will be further explored in the following chapter.

4.2.2.2 Organizational verticalism

Throughout my experiences with the cooperative, I observed a hierarchy of command within the organization through which I also had to navigate for the data gathering processes of this study. While democratic organization is an intrinsic value of PROCOCER and is fostered through the elaborate organizational structure of the CTT and CDM (see Section 2.3.3), the cooperative's day-to-day functioning and management is characterized by verticalism where proposed actions are implemented only after permission is granted from the higher leadership members. As one leadership member pointed out, democracy is expensive, as the CTTs and CDMs incur considerable costs. My field journal entries are punctuated by my frustrations and challenges of working within this system: on one occasion I expressed irritation at the bottleneck that "prevents things from getting done because [the leadership member] is way too busy to approve everything and is barely in the office." This organizational environment at times significantly constrained the scope of the work of the gender specialist, as I recorded one incident where,

> [Marlyn] was supposed to do a workshop as part of the *Escuela de Liderezas* with MMFC for 20 women in PROCOCER, but Domingo didn't get the budget form in to the administration in time for it to get approved, so she found out the afternoon before that it had to be cancelled and had to call all the women to tell them not to come. Now apparently she's behind on 2 of the workshops she's supposed to give with MMFC.

In the context of this study, my working relationship with the gender specialist was also subject to this vertical structure. In reviewing the data collection instruments and methods of the study with the gender specialist, she forwarded these documents to her supervisor for his approval as well, although he never presented objections or comments. In our interview to validate the draft indicator set, she repeatedly requested that I ask her supervisor for further

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information and for his opinion of the indicators, and diverted my requests to view the cooperative data sources to him. I had difficulties setting up meetings with him, and when we could finally meet, he was cautious as to who can view this information and I was not able to access the majority of the documents.

4.2.2.3 Human and financial resources

PROCOCER operates under the limited resources of a base cooperative, and budgeting for its services and programming is a constant struggle for the organization. In light of these strained finances, the staff and leadership members of the organization are understandably overworked and overextended. Collaboration and participation was one of the guiding principles of this study, however the possibilities for face-to-face meetings and dialogue on methodology and instruments were limited in light of the extremely busy schedules of the gender specialist and other leadership members. Arranging interviews and meetings with the staff members presented one of my greatest obstacles in data collection, and these meetings were often delayed, re-scheduled multiple times, or had to be conducted in their personal time after work. In the majority of my interviews, I observed in my field notes that the participant appeared tired, distracted, and anxious to finish the interview, affecting the capacity for collaboration in the development of this study. For example, the gender specialist often only had time to quickly glance over the data collection instruments and I expressed uncertainty in my field journal as to whether she had adequate opportunities to provide comments or feedback. One of the planned focus groups had to be cancelled because of time conflicts with Marlyn's other responsibilities and could not be re-scheduled due to her overwhelming workload.

I encountered similar challenges with the focus group participants, all of whom were extremely busy and often tired and distracted during the sessions. The wide geographic reach of PROCOCER meant that many of the participants had to travel long distances to the focus group meeting sites, as one woman member had a two-hour walk and then an hour-long bus ride to arrive at the meeting site. The majority of the participants also relied on the public transportation system, and the infrequent bus service dictated the length of the focus group sessions and limited the number of topics and depth of discussion that could be covered in the sessions.

A difficulty encountered during the focus groups was a lack of awareness among the producers about the functioning and organization of PROCOCER beyond the direct services that the cooperative provides them. This finding was particularly true of the participants in the first focus group (which took place in a community 2 hours by bus from the PROCOCER office), where the participants generally had very little understanding of FT, what happens to their coffee after they submit it to the cooperative, or how the cooperative is organized. Although the CTTs ensure that every member is represented by a delegate, communication with the 600 members over diverse and often isolated communities continues to be a major concern for PROCOCER. This influenced the extent to which the members could identify programming, services, and other areas that should be improved for women or where more gender equity is needed.

4.2.3 Conceptualizations of gender equity

For the indicators to be relevant to the context of PROCOCER, the subjective meaning of gender equity by the participants of this cooperative was a primary focus of data collection. The findings suggest that the concept gender equity was not clearly understood in the organization, and the challenges that arose in defining this concept shared common characteristics among the leadership and among the cooperative members.

4.2.3.1 Organizational perspectives

I was invited into PROCOCER with the explicit purpose of conducting a study to improve gender equity in the cooperative and to work with the women. Of my first meeting with the leadership members of the cooperative, I described in my field notes that "there was really a lot of tension in the room" and I perceived a sense of "antagonism" from the leaders, surmising that, "they may feel we are here to criticize their work with gender, or they don't feel it's important." The interviews with leadership members suggest that improving gender equity is a valued issue to the cooperative, but it does not take precedence over other concerns they deem more pertinent, such as finding buyers for their coffee or enhancing income-generating projects for the members: a cooperative leader emphasized that commercializing coffee "is the principle business of the cooperative…"

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The interview data suggests significant confusion between the concepts equality and equity at the cooperative level, as a leadership member defined gender equity being,

> …the equality of opportunities for men and women in a process of development. […] that the women come with the same requirements that the men come with and have the same benefits that the men have.

Equity was often equated with "fairness," and defined as equal treatment of the women and men members within the cooperative. When I asked if there are different responsibilities for the women members than the men of the cooperative, a leadership member replied, "No. They can't be different. They are the same." Even though the requirements and responsibilities of the cooperative touch on fundamental structural barriers that prevent many women from participating in the cooperative (as with the criteria of land ownership to have a leadership position in the cooperative) the gender specialist did not feel this was a significant obstacle to equity: "I don't see that that limits us. It doesn't limit [us] because yes, we have women who yes, can fulfill these requirements." In areas where there are very wide discrepancies in the participation of women and men in the cooperative, the key informants emphasized that both women and men *can* participate and that there is no discrimination based on sex. One leader placed the responsibility on the women to change, stating that,

> …what limits the participation of the women members most is the cultural part, feeling completely dependent on their husband or the boss. I think that it is more cultural because the spaces are there, the conditions are here...

The leadership members often cited specific women members who are able to meet these requirements as evidence that the existing approach is conducive to attaining greater equity.

In spite of this emphasis on equal opportunities and fairness, the data suggests that there is some recognition among leadership members that women cannot be treated exactly the same as men. There are efforts on the part of the cooperative to better address the specific needs of the women. There are credit programs for women, such as GMAS, that have more flexible requirements for collateral, and the cooperative attempts to plan meetings and workshops at times that better accommodate the schedules of the women. The gender specialist position was also created to give better follow-up with technical assistance:

> …they speak the same language, they know the children. I think that gives
> more confidence, that Marlyn goes to visit a woman than if Nataniel goes
> or any other of the men technical advisors. I believe that is an important
> element.

Interestingly, discussions of gender equity among the leadership members of PROCOCER were often embedded within broader themes of the family and unity. The gender specialist defined gender equity as having "the same opportunities, as much for men as women, teenage boys and girls, as boy and girl children, in all areas," and suggested that indicators on the participation of the youth in the cooperative be included in the gender equity indicator set. A leadership member explained that the cooperative is working in the issue of gender because,

> …part of the sustainability of the cooperative is that there is an integration
> of the family here, not only the man member but also his wife. To the
> extent that the family integrates to work for the sustainable enterprise
> model as the cooperative enterprise model, we believe that this is going to
> give more life, more base, more sustainability to this process that we lead
> cooperatively.

This speaks not only to that fact that gender equity is considered in the context of family integration rather than the specific needs of women, but also that the impetus for increasing the participation of women is to improve the business of the cooperative. A recurrent theme among the leadership and cooperative members was the importance of, and need for, unity between spouses, in the home, in the community, and in the cooperative. When I asked the gender specialist about her views of the recent increase in women-only cooperatives, she replied that, "I don't see it as very good… to disunite because we are mixed cooperatives of men and women with the same rights and the same duties."

The vast majority of the indicators suggested by the PROCOCER leadership members reflect measurements that count the number of women participating in cooperative programs and services, such as the number of women who have credit from PROCOCER, the number of workshops the women have attended, the number of visits from the technical specialist. Furthermore, the suggested indicators overwhelmingly highlight economic participation, as a leader explained that economic empowerment would reverberate into the home and community spheres of the members:

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> …before only the man earned an income, working different jobs. Now the woman is also looking for ways to generate an income. There is now a change in role, now it not only falls on the man but also the woman. Before the woman got up at 4 [in the morning] to light the fire and prepare the food. Now the man also has to get up because the woman has to go out and the man has to stay to look after the children. Yes, and they are real changes that are happening.

Meanwhile, few of the suggested indicators touch on structural and sociocultural aspects. For example, a leadership member proposed an indicator that 30% of the membership be composed of women by 2015. When I questioned him about this figure, he responded that for there to be 50% women, "…we would have to tell the men […] to give a part of the property to the women. So, we aim for at least 30%." At the time of this interview, 25% of the membership was composed of women, which is revealing of the limits to which the cooperative is willing to challenge the structural issues that are obstacles to women's participation. These conceptualizations of gender equity contributed to the significant challenges I encountered in this study in developing an indicator set that both provides a comprehensive measure of gender equity while also accommodating the perspective and level of commitment of the cooperative towards change.

4.2.3.2 Articulating dreams

In the main activity of the exploratory focus groups, the participants were asked to envision a world where complete gender equity existed in their home, community, and in PROCOCER. In both of the focus groups, the participants encountered significant difficulties in articulating these dreams. For example, when Marlyn asked Elena, one of the cooperative members, what she dreamt in this activity, Elena was silent. Marlyn attempted to prompt her with examples of things that could have happened in the dream, but Elena only responded, "…I didn't think of that." Other responses were very broad and general, and even with probing, some participants had difficulty naming specific, concrete dreams they had. For example, when I asked a women member and coffee grower, Nina, about what she dreamed in the activity, she answered, with the help of my counterpart Yeni:

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Jannie: …for example, how is your crop in your dreams?

Nina: In, real.

Jannie: Real, like… For example, is it different?

Yeni: That if you have a crop now and in your dreams, how does it look to you? How do you see it?

Nina: Yes, because if I have the dreams, as I have in my mind…

Yeni: How do you hope to see it then?

Nina: Better.

Jannie: How? How is it better?

After more discussion from the other participants about their farms, Nina finally specified, "My dream is to grow more coffee."

The participants generally described their dreams for their children, their family, and their work, rarely identifying dreams for their personal needs. Most of the dreams centered on their hopes for their children to attain university degrees and to produce more and better crops on their farms. Some of the participants mentioned more equipment and support from PROCOCER for their farms and access to water, electricity, and paved roads in their communities. Aside from these practical aspirations, the only reference to more personal goals was the desire to be the owner in control of what they have.

A notable exception to these findings was the response of Lucila, who is affiliated with PROCOCER through her membership with GMAS, but is a longtime member of a different FT coffee cooperative that has dedicated considerable resources towards gender issues. In the focus group activity, she was the only participant to articulate a clear "vision and mission" for gender equity:

> …for me, [I dream] that gender equity is as it should be. It is a great advantage as a woman because at least if there is gender equity, it means that there is no abuse in the family, that we live well within the family. And when a family lives well, it means that everything is going well. If I dream that I live well with my family, that I work equally, then it means that there is a good harvest and from this good harvest, there are good finances in the home. There is health, there is everything.

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Interestingly, Lucila was also the only participant who made reference to domestic violence and family planning, later adding that, "…there are husbands that don't like women planning as well. Yes, they don't like it. They like it when the woman has a bunch of a children so that [she] can't leave the house."

The discussions in the focus groups raised issues that many of the participants appeared to never have articulated publicly until this time. A common attitude among participants was that conditions for women are much better than they used to be, as one participant explained, "before there was this *machismo* and now all of this has changed." However, it was in one of the focus groups that the participants realized for the first time how few women there were in leadership positions, as Elena conveyed:

> It's that, looking closely, there isn't gender equity, is there? Because I
> don't see women getting leadership positions in the cooperative. That is,
> in the big leadership positions there aren't women.

In another focus group, when many of the participants attributed the scarcity of women leaders in the cooperative to the lack the capacity of the women, Yeni retorted, "No, capacity, we all have capacity. What happens is that capacity must be developed." In the ensuing discussion, the participants discussed people they know who have taken on leadership positions even though they could not read or write, realizing through this process that capacity was not the factor that was limiting women in leadership positions. The critical issues raised in these sessions suggest that the participatory methods applied in this investigation served not only to facilitate their involvement in the development of an evaluation tool for the cooperative but also plays an important role in the process of reflection and analysis of gender inequities that affect their lives.

4.2.4 Summary

The set of indicators proposed in this study have been developed to conform to the unique objectives, needs, and realities of PROCOCER. A number of complex factors in the organizational culture and mandate of PROCOCER and the different types of knowledge of the members and I influenced the environment that shaped how this investigation was carried out and how the results have subsequently been framed. These influences did not act in isolation,

and the interplay of these different dynamics had considerable implications for participatory

processes in indicator development, which will be explored in next chapter.

Chapter 5. Discussion

The participatory orientation of the study resulted in the development of an indicator set that was inherently shaped by the study context. The challenges encountered in the exploratory phase of data collection required a shift in methodology to create indicators that would represent critical transformations in gender equity within the perspectives of the PROCOCER participants. Participatory evaluation often requires greater attention to process than outcomes (136), and this chapter will be devoted to an examination of the second research question on participatory indicator development. I present here my reflections and learning on the tensions, challenges, and successes on the processes of this study and the potential applicability of the indicator set and participatory methods for other evaluation endeavors.

In the participatory evaluation literature, reports and case studies are often presented as remarkably clean, linear processes, and do not do justice to the "messiness" of how it generally plays out. The scale of many such studies cannot be reached in a Master's research project where, for example, there were pressures for timely results from my academic program and PROCOCER, financial resources were lacking, the cooperative leaders and staff had little time or energy to collaborate in this study, and many women members could not participate in this study for the same reasons that they do not take on leadership positions – the lack of time and the limitations on their mobility. Hochfeld and Bassadien (114) challenge the possibility of achieving collective decision-making by all stakeholders in participatory evaluation:

> This conception of participation, while ideologically seductive to
> champions of participatory research, is not always realistic, particularly
> when external consultants are asked to manage the process… for us, the
> tension was between ensuring participation, and not wanting to demand
> too much of an overstretched organization's time and resources. (p.220)

In the conceptualization of participation as a continuum along which participatory methodologies can be adapted to conventional methods of evaluation, the location of a project on this spectrum depends on the unique constraints in which the study occurs. I explore these themes in the following section, beginning with a discussion on the influences of the study context and the emerging partnership between PROCOCER and I, the implications of the framing the indicators within women's empowerment, the role of the different actors, and

finally reflections on the future work needed to further explorations of participatory indicator development.

5.1 Importance of context

The processes of participatory indicator development are embedded in more than the immediate sociocultural and organizational factors; the deeper historical context in which the study takes place is all too often overlooked and unacknowledged. As these circumstances shaped the relationships and dynamics of this research partnership and study process, it compels me to step back and reflect on the historical factors that influenced the course of this study in profound ways, factors that include the legacy of colonialism and the "gender order" that permeated everyday interactions.

During my first meeting with PROCOCER, one of the leaders sardonically asked when one of their members would have the opportunity to go to the North for a similar project. My personal experiences in Nicaragua have been characterized by a constant negotiation and re-negotiation of what I represent as a privileged, Western-educated and culturally White young woman from the North. As Whisnant (45) observes, "although the conquest and the colonial period were time-limited, their cultural-political effects have proven very durable over a period of now nearly five hundred years." (p.434) The proliferation of aid organizations and international volunteers in Nicaragua has contributed to the complex dance between power and privilege. Far beyond the destructive economic consequences of colonization, it has created the highly unequal relationships between Nicaraguans and foreigners, characterized by an often resentful dependency on Northern funds to sustain their work. This hierarchy has also been propagated in "colonizing" forms of research (151)(p.501), where "…researchers enter communities or health centers, collect data, provide no direct benefits, and leave without giving feedback or taking noticeable actions" (177)(p.2636) – a practice many Northern researchers continue to do.

I also entered Nicaragua in the midst of shifting and highly divisive gender politics:

> …each effort to raise the social status of women has come into conflict with… the established (hence resistant) "gender order" of culture[23]… This gender order is reproduced in everyday practices, legitimized by institutions, reinforced by *machismo* and the hegemonic order created to service men's interests, and sometimes even from women's collaboration. (45)(p.442)

Recent tensions within feminist movements and a burgeoning anti-feminist movement intersect with political loyalties (43,45), and this also plays out in the PROCOCER cooperative, among both the women and men. My being a woman may have influenced the responses I received from the female and male participants, and my intervention on the side of the women in PROCOCER has implications for how the results of this study are received by the cooperative leaders.

Whitmore (136) observes, "issues of race, class, and gender are rarely addressed in evaluations yet operate everywhere." (p.228) Far beyond my developing partnership with PROCOCER, the powerful impacts of the economic, political, and cultural environment shaped – and in some ways predetermined – the nature of my interactions and relationships with the organizations, communities, and participants and influenced study outcomes in a profound way.

5.2 Influences of the emerging partnership

Even though PROCOCER was a member of the larger research partnership and volunteered as the research site of this study, the relationship between this cooperative, my research supervisor, and I was still very much in its nascent stages. The politics of this negotiated space were shifting and complex throughout my time in the field, and this developing relationship often required navigation of the multiple agendas of the diverse stakeholders. As Hanson and Terstappen write, the literature on research partnerships typically focus on logistical challenges without adequate attention to the deeper political issues between partnerships, such as the power hierarchies between North-South collaborators and between researchers and community partners (5). I will explore here key issues in this relationship – trust, power, and reciprocity – based on my experiences with PROCOCER in this study.

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[23] Defined here as the pattern of gender power relations and definitions of masculinity and femininity that have been historically constructed (45).

5.2.1 Trust

As my primary research partners, fostering trust with PROCOCER's leadership was key to open communication and collaboration. My experiences of building our trust over the course of the study was patchy and challenging, especially given the relatively short amount of time I spent with the organization. PROCOCER appears to have worked with foreign researchers previously and were understandably guarded, harboring reservations that I would share my results with the cooperative. Issues of trust may also have influenced the type of the responses I received in interviews with the key informants. The wariness of some leaders that I was there to criticize their work may have manifested in the sense of defensiveness of the cooperative's gender work during our interviews. My relationship with the cooperative was not immune to the historical baggage of North-South relations, as PROCOCER is a small cooperative that is financially dependent on external funding from international organizations. I represent a potential contact and ally for future donors of the cooperative and the PROCOCER leaders may have felt the need to "sell" their cooperative to me in the interests of attracting potential funders.

While the identification of "insider" or "outsider" to the community is relational and multidimensional (178), I was mostly an outsider and stranger to the focus group participants. I share Whitmore's (136) reflections that,

> …there are limitations on how familiar an outside evaluator can be with the local culture and how much she or he will be trusted… my relationship with them was burdened with the legacy of colonialism, no matter how sympathetic I might have been… In addition, I am an academic, worlds apart from a group of illiterate goat farmers." (p.228)

Asking the participants the share their hopes and dreams for the future is a personal question, and the rarity with which important (and sensitive) themes such as violence against women emerged from the data may be related to my outsider status. However, there are both advantages and disadvantages to this dynamic: "just as outsiders' perception might be limited because of their lack of knowledge and acquaintance with local realities, local people's perception might be limited because of their particularity." (179)(p.90) For example, being an outsider required the participants to explain (and in the process examine) sociocultural realities that were foreign to me but had been unquestioningly accepted by them. My transparency in my background and

objectives with the participants and my relationship with the gender specialist are important foundations upon which trust is built, but it is a gradual process that requires time.

5.2.2 Power and resistance

Horowitz et al. (177) write, "CBPR partnerships cross cultures and cross social classes, and issues of power and conflict arise." (p.2639) Though power hierarchies were always present between the participants and myself, the focus group methodology helped to minimize this effect. The focus group questions emphasized the importance and value of each individual's unique opinions and experiences in the study, and the participants felt comfortable defending their diverging opinions and contradicting my statements. These dynamics were more complex within the partnership, however. In an organizational context of verticalism[24], it was difficult to escape the inequitable power hierarchies with my organizational counterpart in our relationship as collaborators. I endeavored to prioritize her expert knowledge and welcomed her feedback in all the research processes, and we developed a friendship outside of our research relationship where we stepped out of our respective roles as "researcher" and "collaborator." Nevertheless, our working relationship never reached a level of trust where she could feel comfortable contradicting me or where decision-making was equally shared. These circumstances affected the extent to which the indicators were developed in a truly collaborative or participatory way.

Issues of power are too often oversimplified and presented as unidirectional in research (5), negating the power inequities that also exist between actors and within organizations. The organizational verticalism that limits the scope of the gender specialist's work may similarly have affected her participation in the study. My personal interactions with the gender specialist and her comments during the focus group hint at perhaps stronger views on gender equity than her responses in our key informant interviews, but her paid position in the cooperative may have contributed to her reluctance to be more outspoken with the indicators. Power and resistance can also be enacted in other ways as power dynamics are fluid and multidimensional, even among North-South relationships. For example, a cooperative leader was reluctant to share

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[24] This verticalism is heavily influenced by the historical context of the cooperative movement in Nicaragua, which is a product of the Sandinista movement and the exigencies of a country at war, the economic crisis, and the need for national unity in the 1980's (180-182). These conditions created a legacy of vertical command and bureaucratic forms of leadership within cooperatives.

cooperative documents with me and repeatedly delayed our interview, perhaps a reaction to the power I represented and his implicit way of shifting power inequities. Whitmore writes, as participatory approaches "are indeed intended to intervene on the side of those with less power, those with power in a given situation are bound to resent it" (136)(p.229). I interfered with gender dynamics in the cooperative when I only invited women to the focus groups, and I sensed some tensions towards my approach. Power dynamics are complex, and I continue to grapple with and reflect on events that stand out for me even after I have left the field. The short amount of time I spent with PROCOCER has only allowed me a small glimpse into these relationships of power and resistance, though they had a pervasive role in this study.

5.2.3 Reciprocity

A key learning from this experience is the role of reciprocity in cultivating trust and addressing power inequities. While literature on the ethical conduct of research typically include reciprocity as one of the crucial elements, the practice of reciprocity was more often described as adapting the research questions to the specific needs of the study community and as knowledge translation exercises with the study participants (166,183). I had entered this partnership with the belief that addressing the need for an evaluation tool for gender equity and contributing my results to the cooperative would be an adequate exercise of reciprocity, but my experiences in this project revealed that the study results alone are often not enough in a true commitment to reciprocal research.

The ways in which I practiced reciprocity amidst the multiple agendas of our partnership required contributions to other initiatives that were outside of this study. In addition to my technical assistance with the development of PROCOCER's socioeconomic database, the focus groups were structured as popular education workshops, with discussions on topics of interest to participants developed in collaboration with the gender specialist, such as the discussion on FT pricing. Additionally, I co-designed and co-facilitated a workshop with Ganem-Cuenca, *Where this is no Pap*, in one of the PROCOCER communities to raise awareness of the importance of women's reproductive and sexual health. These were opportunities to match the synergies between the cooperatives' needs with the skills I brought to the partnership. That the cooperative approached me for support in developing their database signaled an important

turning point in the process of building mutual support and respect between us. The cooperative leaders were considerably more welcoming of my work in the cooperative as it helped to make my intentions and dedication to this work apparent.

Discussions of reciprocity beyond the study outcomes are crucial to fostering trust between the research partners. Although in this case, a dedication to reciprocity required me to set aside a significant portion of time and energy away from data collection, reciprocity can take different forms and require varying levels of resource commitments. Moreover, researchers traditionally engage in knowledge translation as a form of reciprocity at the completion of their fieldwork or research project (166); a practice that overlooks the plethora of ways in which the researcher's skills can contribute to other community needs during fieldwork. This is particularly important in the context of international research projects where returning to the study community can be difficult. Although Becker et al. (184) briefly describe the role of attending to the partner's interests and needs in establishing trustworthiness and gaining trust, the existing literature does not do justice to the complexity of the processes of reciprocity. More discussions need to take place to explore the dynamics of this exchange and to consider reciprocity as more than an ethical consideration, but as a vital element of developing partnerships.

5.3 Importance of framing

The selection of indicators is a political act, particularly with a complex social construct such as gender equity. The decision to frame the indicator set within a women's empowerment model evolved from analyses of the exploratory data, where many of the themes that emerged logically fit within the dimensions of this framework. The need for the indicators to assess not only women's access to resources and numerical increases in participation, but also to reflect their control over these processes, speaks to the importance of focusing on the multiple facets of empowerment. Gender inequity is a symptom of the inequitable power relationships between women and men (14), and the marginalization of women from positions of power in PROCOCER necessitates emphasis on the empowerment of women to address the roots of these inequities. Moreover, this study is intended to compliment and build upon the work of FLO and the MMFC in gender equity, and the MMFC explicitly identifies women's empowerment as its

primary strategy (100). Applying an empowerment lens to this indicator set enhances its relevance and usefulness for PROCOCER and the ease with which it can be adapted by other member organizations of the MMFC.

That FT impact assessments rarely disaggregate by sex (8) is a shortcoming that, given the under-representation of women in cooperatives, suggests that existing documentation principally represents men's perspectives and interests. Lin et al.'s review (185) of gender equity indicators in the health literature finds that they most often utilize the status of men as the baseline with which to compare that of women, restricting the scope of the indicators to aspects where men have achieved "success". This assumes that women's needs and modes of interaction are identical to that of men, and that women respond to similarly created opportunities (26). Alternately, applying the lens of women's empowerment to an analysis of gender equity explicitly seeks out and includes issues specific to women that may otherwise have been hidden in conventional measures. While many of the indicators developed in this study require comparisons between women and men, some pertain solely to women as there are no male equivalent measures. This approach is gaining recognition among other examples of gender equity indicators in the literature, as with the shift of the UNDP measure to include indicators specific to women's reproductive health in the GII measure (115).

The framing of women's empowerment in this indicator set differs from Hochfeld and Bassadien's (114) experience developing participatory gender-sensitive indicators, where they contend that the focus on women disregards men's gendered identities. In this study, framing the indicators on women's empowerment has the potential to compromise external validity, as the indicator set may not be representative of the views of the entire membership, of which the majority are men. However, the decision to focus explicitly on women is not meant to ignore the importance of men's perspectives and roles in gender equity; equity is a relational concept and perceptions of equity can be diverse. Nonetheless, the current reality of the absence of women from cooperative spaces compels efforts to better understand their perspectives and highlight their voices. It is my hope that progress towards more equitable gender relationships in PROCOCER will enable the greater involvement of men in the continual improvement and evolution of the indicators. Finally, the indicators also emphasize the role of the cooperative staff and male membership in creating enabling conditions and as active agents in changing

gender relations.

5.4 Importance of capacity-building

Although the indicator set was intended to principally reflect the perspectives of the PROCOCER members and coproducers, I encountered significant difficulties gathering data around the participants' hopes for a better future or what gender equity could mean in their lives, and their perspectives at times upheld many of the stereotyes around gender roles and *machismo*. These findings contrast sharply with those of Terstappen's case study with la FEM, where the women producers critically analyzed gender inequities in their lives, in their communities, and in the international coffee industry while articulating possibilities for change (7). Terstappen notes that this capacity has been developed over many years of education through la FEM (7), an important difference from the participants in this study. A second challenge arose from the cooperative leadership, where the interview data at times revealed a lack of critical awareness of gender inequities and their structural causes, which is perhaps a reflection of the cooperative's organizational priorities and relative inexperience in gender work. These challenges in conceptualizing gender equity among the PROCOCER participants raise important questions about the role of experiential knowledge in participatory research. As Whitmore (136) observes, "it's important not to romanticize "the community" or pretend that "the people" or the powerless are always right" (p.229), a finding echoed by Gonzalez Manchón and MacLeod's study (40) on Nicaragua's National Federation of Cooperatives (FENACOOP), where "women themselves are not always allies in the struggle for gender equality" (p.384). In light of the prevailing gender order, how can participatory research represent the lived experiences and perspectives of the participants without colluding in oppressive practices that sustain these inequalities?

Rowlands (124) advocates that,

> women need to be free to act from their own analysis and priorities and not be manipulated by outsiders; yet the restrictions of internalized oppression, which limit women's options, must be challenged. If possible, a methodology should be adopted that will help women to perceive the limitations that they place on themselves. (p.134)

Consciousness-raising and capacity-building activities around gender issues in PROCOCER is one possible contribution to this debate, as it has the potential to develop the critical consciousness of the cooperative leaders and members to facilitate meaningful participation in evaluation efforts. While these efforts must be ongoing, the researcher can also act as one of the facilitators and agents of change in this process. Although participatory research equally values the experiential knowledge of the participants, the guide *Educating for a Change* (186) contends that facilitators also bring particular skills and knowledge that can constructively challenge participant perspectives, such as strongly held views that are sexist or class-biased: "Social change education is not an invitation for the educator to be self-effacing. It is a challenge to provide expertise strategically and respectfully" (p.127). Bhasin (179) adds,

> a sensitive outsider can enrich the discussions by bringing in other experiences, perceptions, perspectives, and dimensions. There can be areas that local people either forget to look at or do not want to look at. It is the outsiders' role to bring these forgotten elements or reality into discussion, however unpleasant this might be." (p.90)

While the findings in this study reveal the role of the focus group discussions in initiating a process of collective identification and analysis of gender inequities, the short period of my fieldwork cannot represent transformative or empowering practices without sustained efforts to continue these discussions and education. Townsend (161) questions the ability of academic fieldwork to facilitate the empowerment of study participants, as it is generally "too short and too little action-oriented." (p.104) However, the small advances in this study can initiate and contribute to the process of longterm change and empowerment, which will be dependent on PROCOCER to continue and build.[25]

Moreover, the differing definitions and uses of indicators between PROCOCER leaders and the academic literature, and the contrasts between the participants' worldviews and the scientific paradigm created difficulties in how the indicators were created and validated in this study. This speaks to the tensions in participatory research to balance scientific rigor with experiential knowledge (177), where an "optimal tradeoff" needs to be sought to reconcile the two strong traditions of participatory development and empirical research (175)(p.176).

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[25] Anecdotal evidence of this effect has since been reported by leaders in the cooperative, who suggest that this and Ganem-Cuenca's study with PROCOCER have led to increased visibilization of gender issues and an increased the commitment to act on them (Lori Hanson, personal communication, February 2011).

Freedman (187) notes, "the art of evaluating in the participatory mode entails treading a fine line between adopting procedures for systematically asking and recording the right kind of data and adapting these procedures to the capacities of non-scholarly participants." (p.28) How these challenges are resolved is not well documented in the literature, and Remenyi's case study on the participatory development of the Participatory Poverty Index details one of the few examples. The research team in this project conducted consultations with village members to validate indicators from the literature, which involved "time-consuming and detailed explanation of the meaning of each indicator and how each might be used to tell us about the incidence of poverty in their village." (143)(p.157)

In the context of PROCOCER, indicators are more than internal evaluative tools for the cooperative, they also provide a means to demonstrate the impact of their programming to international funders. The application of indicators that are consistent with the literature is conducive to the objectives of PROCOCER, and the participatory orientation of this study contributed to building the capacity of the organization and participants in technical aspects of conventional indicator use and development. However, this may be viewed as continuing to privilege formal scientific knowledge above local understanding, a practice that legitimates and reinforces the hierarchical nature of skill transmission and the authority and power of Northern experts (26,188). These conflicts speak to the contradictions and challenges of interrogating traditional hierarchies in knowledge construction in the context of a colonial legacy that continues to shape PROCOCER's needs and priorities. Engaging in "dialogue, listening, and learning" (189)(p.430) to collectively define indicators may be more appropriate to the core values of participatory research and to accommodate diverse worldviews. How these principles can be adapted to projects of this scale, however, require further exploration beyond this study.

5.5 Importance of different types of knowledge

Participatory evaluation requires an examination of not only who participates, but also how they participate (138). Although the archetypal project would engage members of the study community as "co-learners, co-researchers, and co-activists of a common concern" (189)(p.429), project constraints may not always enable the conditions that can facilitate this form of participation. In the conceptualization of participation as a continuum (135), diverse

actors can have different roles and different levels of participation, contributing different types of knowledge to the study process.

The difficulties among PROCOCER participants in conceptualizing gender equity required me to shift the study methodology to include the input of external experts to inform the development of the indicators. These two informants played important supporting roles to provide critical perspectives that built upon those of the PROCOCER participants. The strategic balance of distinct types of knowledge contributed to measures of gender equity that do not merely uphold the status quo but include more far-reaching assessments of change. My knowledge, observations, and academic training had arguably the greatest influence on the indicators, as I held the greatest control over the final decisions on indicator selection. Hochfeld and Bassadien (114) detail similar struggles they encountered in developing gender-sensitive indicators, and they write, "…it was not just a matter of us 'suppressing' data that we 'didn't like,' but rather finding ways to ensure that indicators developed do not serve to reproduce inequalities, while still serving community needs." (p.222) My views and those of the external experts were integrated carefully in order to maintain the primacy of PROCOCER perspectives, which at times required the exclusion of salient aspects of empowerment and equity. Nunally (190) contends, "one validates not a measurement instrument but rather some use to which the instrument is put." (p.133) A strategic balance was essential to produce an indicator set that is realistic and relevant to the commitment and willingness of PROCOCER towards improving gender equity. This mirrors Gonzalez Manchón and Macleod's (40) questions of "how fast was too fast?" in pushing for change in FENACOOP: "it is important to gauge when to push and when not to…" (p.384) Whitmore (136) reflects on similar challenges in her research with a Mexican agricultural cooperative: "if I pushed them too far, I would undo whatever little progress we might make on this and other fronts." (p.228)

These issues are also closely linked to the previous discussion on capacity-building, as "[b]alanced participation presupposes that all groups possess a comparable amount of information about the stakes of evaluation, as well as skills to formulate and argue about future collective projects (191). Becker et al. (184) note,

> "[i]nfluence and power imbalances may not be solved… by simply
> encouraging equal participation in group discussion… If influence is skill
> based, skilled members can transfer those skills to other members through

training. If verbal fluency is a source of influence, members can interact in small groups in order to develop verbal skills and confidence. If information results in power, all members can be given the same information as soon as possible." (p.65)

Furthermore, a major oversight was that the role of each stakeholder in this study was never openly negotiated, but rather assumed by the different actors. I had entered the partnership anticipating PROCOCER to be full collaborators in this study, but the initiative to engage participatory research was largely a unilateral commitment on my part. Anderson and Gilsig (192) write that, "equal leadership is inherent in equal participation, but when there are differing areas of legitimate concern, participation is inherently unequal." (p.164) Nonetheless, Newman (193) contends that different forms of participation are equally valid and useful. In navigating the various agendas of the stakeholders, open negotiation of the type of involvement that the different actors would contribute to the study is conducive to more realistic expectations, and an openness and transparency in reporting when participatory methodologies are used and when they are not enhances the level of trust in this negotiation (193).

It is important to note that this study was carried out in the early stages of actions to improve gender equity in the cooperative, where the direction of its gender strategy and policy was yet to be defined and there had been little previous gender training among its members. This speaks to the role of timing for evaluation projects along the organizational trajectory of gender work in PROCOCER. The developing nature PROCOCER's gender work resulted in a dependence on outside expertise and knowledge to strengthen cooperative efforts, whereas the implementation of this study at a later point when its gender work is more established may perhaps look much different.

5.6 Summary

Huberman (194) expounds, "[p]articipatory evaluation is a noble but elusive construct." (p.104) The demands of participatory methodologies were challenging in the context of a project of this scale, as they require significant inputs of time, funding, and expertise. The difficulties encountered in this study were not the result of a lack of interest in participatory processes, but largely from logistical and practical obstacles (which are typical of small, non-profit, community-based organizations such as PROCOCER) and the organizational and

historical context in which this partnership developed. As Mayoux (195) observes, "participatory research is no panacea" but it is "a viable more empowering alternative to conventional survey methods." (p.98) Community participation in evaluation projects should be valued along a continuum rather than a dichotomy, where the principal objective is to maintain a "collaborative relationship in which all parties contribute understanding and knowledge in an atmosphere of respect and mutuality." (136)(p.229) In the iterative spirals of participatory research (135,170), the reflections and learning that emerge from this experience serve to inform continuing research and action by the research partnership towards social justice and change.

Chapter 6. Study limitations, conclusions, and future directions

       On my last trip to El Jícaro for the final round of data collection, I make the trek out to Sayra's house to say goodbye to her and her family, with whom I have grown close in these few months. I sit with Sayra and her neighbor Ofelia on her front patio with steaming cups of coffee and freshly made *rosquillas*[26], and I ask them about the recent Papanicolau clinic in their community. Two weeks prior, Alejandra and I facilitated our *Where there is no Pap* workshop for women in the community with the support of the community nurse and in anticipation of this clinic. When Ofelia tells me that only a few more women than the usual number came to the clinic, I feel somewhat disappointed. Discussing this with Alejandra later, we come to realize that the impacts of the workshop manifest in other ways: the participants unanimously spoke of the amount they learned about their reproductive organs and they had opportunities to discuss health issues that are often seen as embarrassing and not openly talked about. Change occurs in subtle and often intangible ways and, while an indicator of clinic attendance may not reveal a significant impact, these small steps are hopefully the beginning of a longterm process that also affects other aspects of their lives.

       This investigation explores similar challenges in attempting to assess and attribute changes in gender equity to the PROCOCER cooperative and FT. Beyond the empirical difficulties in measuring a complex and multidimensional social construct, as an action-research project, the highest priority of this research is to produce an indicator set that is relevant and immediately useable to PROCOCER. This entailed a balance of the cooperative objectives with the requisites for women's empowerment, of the data limitations with more accurate measures, and many other considerations. In addition, the vignette above demonstrates the vital relationship between gender equity and empowerment with health. While this example pertains directly to the health sector, gender equity as a determinant of health that often influences more indirect – and less tangible – effects on health. While Terstappen's study highlights the diverse ways in which health is conceived by woman coffee producers (7), this study lends further conceptual detail into the ways in which gender equity in FT can be explored, contributing to the continued efforts to examine these links.

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[26] Biscuits made of cornmeal and cheese.

While the PROCOCER cooperative is in a constant state of evolution – as are its gender policies – the indicator set also needs to evolve with the organization in order to remain relevant. To achieve this, continued capacity-building and consciousness-raising among cooperative leaders, members, and coproducers is needed to enable their greater ownership of and control over this information. As the greatest challenge in the development of these indicators arose from the limitations of the data sources available to the cooperative, the suggested indicators in this set therefore serve to identify some of the knowledge gaps. Continued efforts are also needed to improve the trustworthiness and reliability of the cooperative database, expanding the breadth of the data to encompass assessment of household and individual experiences, and gathering more subjective information on the members. Furthermore, this study examined gender issues within the context of women as a homogenous group and did not include intersections of difference. This is an important shortcoming and, with the greater depth and detail of data available to the cooperative, future analyses can be further disaggregated by other social stratifiers, such as marital status and geographical location. This will hopefully also include a greater integration of the coproducers, whose contributions are typically uncounted and invisible in coffee production, and an issue this study was not able to adequately address.

The decision to locate this indicator set within one specific cooperative allowed for an in-depth examination of the complex interaction of factors in an examination of gender equity and participatory indicator development. PROCOCER represents a unique context in how it addresses gender issues, and the diversity of cooperatives in FT means that care must be taken in assessing the extent to which this indicator set is applicable to other contexts. Nonetheless, the broad dimensions and concepts of this particular indicator set can provide invaluable insights for other cooperatives and the research partnership in similar endeavors, serving as a starting point to identify broad areas of gender equity that require further attention.

The exploration and discussion of the lessons learned from participatory indicator development only reflect my perspectives and experiences during this study, and the inclusion of those of my partners would have contributed to a fuller understanding of these issues. While the time limitations of my fieldwork prevented debriefing and feedback with PROCOCER, future meetings of the research partnership will provide opportunities to reflect on this

experience. The relevance of this study's participatory methodology for other organizations, or even for the future endeavors of PROCOCER, is complex, as the exact replication of participatory methods is rare given the diversity of project contexts and experiences (196). Therefore, the discussions in this thesis serve to highlight neglected issues that require careful consideration in participatory indicator development rather than to provide a model or template of concrete actions. Perhaps the most salient lesson from this experience is that participatory evaluation requires "an open mind, flexibility, and a step-by-step approach" (145)(p.406), where the researcher is prepared to (and anticipates) adapting the types and degrees of participation during the research process. The struggles and challenges I elucidate in this thesis are perhaps the pitfalls and hurdles of a novice researcher; nevertheless, Bacon (188) writes, "…many other research practices, which may not fit directly with the concepts and terms used [in participatory action research], can be both participatory and action-oriented." This study presents one example of how participatory approaches can be adapted to conventional methods of indicator development, and I feel it is important to highlight these experiences as a critical opportunity for learning and to add greater depth to this nascent body of literature. Much more documentation is needed to contribute other dimensions to this discussion.

Finally, this indicator set can only indirectly attribute improvements in gender equity in PROCOCER to participation in FT, as a myriad of other influences contribute to the difficulties in isolating the effects solely to FT. The results of this study do, however, identify specific areas that are directly influenced by FT (such as the social premium) and broad areas that are indirectly influenced by FT (such as the higher incomes from FT prices). Continued education is needed among the producers and coproducers to raise awareness and knowledge of FT as well as more research to help disentangle the impacts of FT on gender equity. It is my hope that the outcomes of this study will promote the greater use of participatory approaches to evaluate FT and that future research will include the perspectives of women as a requisite, recognizing their diverse and active contributions to this movement.

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Appendix 1. Stage 1 focus groups guide: Sharing experiences activity

These questions were guided by Cohen and Upoff's rubric of participation (197) *and Rifkin's CHOICE framework* (198). *(I have translated the questions from Spanish).*

1) Participation
- What do you do in agricultural production?
        - Is that different from what men do? If so, how?
- What are your responsibilities in PROCOCER?
- Have you had leadership positions in PROCOCER? If no, why not?
- Are you involved in commercialization in PROCOCER? If yes, how?

2) Benefits
- What support have you received from PROCOCER? From Fair Trade?
- What benefits have your children and families received from PROCOCER?
- What changes have you experienced in your lives since have become involved with PROCOCER?
        - What are the positive and negative aspects?

3) Facilitating and limiting factors
- What things help your participation in agricultural production?
        - What conditions in PROCOCER?
        - What conditions in the home?
- What limits your participation in agricultural production?
        - What conditions in PROCOCER?
        - What conditions in the home?

Appendix 2. Stage 1 focus groups guide: Dreams activity

The participants were asked to close their eyes while the facilitator read the following narrative, adapted from Escalante and Peinador (1998) (99)p. 93-94. (I have translated this narrative from Spanish).

Last night, you were very tired, very, very tired. You barely laid down to bed when you fell into a deep sleep and began to dream. In the beginning, you couldn't recognize what you were seeing. It was strange, different. It was as if in your community things were upside-down. The women and the men were different, even the girls and the boys! You couldn't believe what you were seeing. More and more you liked what you saw. You didn't know what had happened, but it was as if certain things that you had always dreamed of had changed. It seemed that everywhere, women and men were treated as equals. Even more, the men and the women felt equal. They thought differently, felt differently, and saw things in a different way. The people, their attitudes, gestures, things that they do, things that they could do, were different.

Imagine, in this new world where gender equity is a reality, what conditions do the women live in?
- How is the production on the farm?
- What things do they have in the house?
- How is their health?
- Who makes the decisions in the home?

- How do the women participate in the cooperative?
- What organizational positions do they hold?
- How are they involved in the sale of the coffee?
- What type of benefits do they receive?
- What type of support do their children receive?

But suddenly, you wake up. You had a strange feeling that only a few minutes had passed, but that also many years had passed as well. You feel that you had really traveled in time and this makes you feel good. Is this dream possible?

Each participant was then asked to share with the group what they imagined in the activity.

Reflection questions:
- How did you feel about this activity?
- What changes would be needed for these dreams to become reality?

Appendix 3. Stage 3 key informant interviews guide.

(I have translated these questions from Spanish.)

Theme 1: Collecting validity evidence for the indicator concepts

1) Do these concepts measure aspects that are relevant to gender equity?
2) Are these concepts aspects that PROCOCER can influence?
3) Are other concepts needed?

Theme 2: Collecting validity evidence for the indicators

3) To what extent do the indicators represent the concepts they try to measure?
4) Do the indicators capture subjective and objective aspects of the realities they try to measure?

Appendix 4. Ethics certificates

UNIVERSITY OF SASKATCHEWAN

Behavioural Research Ethics Board (Beh-REB)
Certificate of Approval

PRINCIPAL INVESTIGATOR	DEPARTMENT	BEH#
Lori Hanson	Community Health and Epidemiology	09-296

INSTITUTION(S) WHERE RESEARCH WILL BE CONDUCTED
University of Saskatchewan

STUDENT RESEARCHERS
Jannie Wing-Sea Leung

SPONSOR
UNIVERSITY OF SASKATCHEWAN

TITLE
Making the Invisible Count: Participatory Indicator Development to Measure Gender Equity in Fair Trade Coffee Cooperatives in Nicaragua

ORIGINAL REVIEW DATE	APPROVAL ON	APPROVAL OF:	EXPIRY DATE
05-Jan-2010	05-Feb-2010	Ethics Application	04-Feb-2011
		Consent Protocol	

Full Board Meeting ☐   Date of Full Board Meeting:
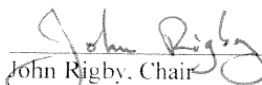
Delegated Review ☒

CERTIFICATION
The University of Saskatchewan Behavioural Research Ethics Board has reviewed the above-named research project. The proposal was found to be acceptable on ethical grounds. The principal investigator has the responsibility for any other administrative or regulatory approvals that may pertain to this research project, and for ensuring that the authorized research is carried out according to the conditions outlined in the original protocol submitted for ethics review. This Certificate of Approval is valid for the above time period provided there is no change in experimental protocol or consent process or documents.

Any significant changes to your proposed method, or your consent and recruitment procedures should be reported to the Chair for Research Ethics Board consideration in advance of its implementation.

ONGOING REVIEW REQUIREMENTS
In order to receive annual renewal, a status report must be submitted to the REB Chair for Board consideration within one month of the current expiry date each year the study remains open, and upon study completion. Please refer to the following website for further instructions: *http://www.usask.ca/research/ethics_review/*

John Rigby, Chair
University of Saskatchewan
Behavioural Research Ethics Board

Please send all correspondence to:

Research Ethics Office
University of Saskatchewan
Box 5000 RPO University, 1602-110 Gymnasium Place
Saskatoon SK S7N 4J8

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UNIVERSITY OF SASKATCHEWAN

Certificate of Approval
Study Amendment

PRINCIPAL INVESTIGATOR	DEPARTMENT	Beh #
Lori Hanson	Community Health and Epidemiology	09-296

INSTITUTION(S) WHERE RESEARCH WILL BE CARRIED OUT
University of Saskatchewan

STUDENT RESEARCHER(S)
Jannie Wing-Sea Leung

SPONSORING AGENCIES
UNIVERSITY OF SASKATCHEWAN

TITLE
Making the Invisible Count: Participatory Indicator Development to Measure Gender Equity in Fair Trade Coffee Cooperatives in Nicaragua

APPROVAL OF	APPROVED ON	CURRENT EXPIRY DATE
Focus Group Protocol - Appendix G	10-May-2010	04-Feb-2011
Interview Protocol - Appendix H		

Full Board Meeting ☐   Date of Full Board Meeting:

Delegated Review ☒

CERTIFICATION
The University of Saskatchewan Behavioural Research Ethics Board has reviewed the above-named research project. The proposal was found to be acceptable on ethical grounds. The principal investigator has the responsibility for any other administrative or regulatory approvals that may pertain to this research project, and for ensuring that the authorized research is carried out according to the conditions outlined in the original protocol submitted for ethics review. This Certificate of Approval is valid for the above time period provided there is no change in experimental protocol or consent process or documents.

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John Rigby, Chair
University of Saskatchewan
Behavioural Research Ethics Board

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Appendix 5. Criteria for rigor and credibility in culturally competent research (199).

Criteria	How this study addresses this criteria
Contextuality *Sensitivity to the historical and sociocultural context that contribute to participants' responses and interpretations.*	• I dedicated over three months to linguistic and cultural immersion in Nicaragua prior to data collection, which included a field course in Nicaragua in May and June 2009 and language training in January and February 2010. • My immersion experiences continued throughout fieldwork, which included homestays with producer families.
Relevance *The research questions address issues significant to the population of interest and improve their lives.*	• This study was identified and defined by the research partnership, of which PROCOCER is an active part. • The partner organization, PROCOCER, has immediate plans to implement the indicators in its next cycle of evaluation.
Communication styles *Critical understanding of preferred communication styles for the research participants and their communities.*	• Organizational counterparts reviewed the data collection instruments for clarity and cultural appropriateness and assisted me in conducting the focus groups as a cultural and linguistic bridge. • I modeled the focus groups after the participatory workshops commonly conducted in the cooperative. • I minimized the use to written material to accommodate varying literacy levels. • I asked restating and contrast questions during the focus groups and interviews to ensure that both my questions and their responses are clearly understood. • Nicaraguan research assistants transcribed the data.
Awareness of identity and power differentials *The ability to establish more horizontal relationships and develop shared authority and ownership of the data.*	• I collaborated with my organizational counterpart in the development of the study methods and instruments. • I regularly journaled my reflections and observations to issues of power throughout the research process. • The participants involved with preliminary data collection were invited to review and provide feedback on the draft set of indicators. • The study findings will be submitted to PROCOCER.
Disclosure *Strategies used to build and establish trust.*	• PROCOCER invited focus group participants to partake in the study, and this partnership helped to establish trust between participants and researcher. • The verbal informed consent process ensured participant understanding of their rights in this study.

Reciprocation *Ensure that all parties involved meet their own goals from the research process and through the research findings.*	• The indicator set was developed to reflect the objectives of the cooperative and the perspectives of the members. • The focus groups facilitated knowledge exchange between the researcher and participants, and topics were developed in collaboration with the organizational counterpart. • I assisted PROCOCER in projects that addressed other goals of the cooperative for our relationship but were not directly related to this study, such as providing technical support for their socioeconomic database.
Empowerment *The research process raises the consciousness of the research team and participants.*	• Contributed to raising the critical consciousness of the participants to gender issues. • Contributed to building the participants' capacity to be meaningfully involved in evaluation initiatives.
Time *Flexible approach to time.*	I dedicated six months for fieldwork to allow adequate time for partnership development and data collection processes.

Appendix 6. List of original Spanish quotes with English translations.

Pg.	Translation	Original
1	It isn't that the man has more rights than we do, because we also are women and we have the same rights that the men have. […] All that the man needs, the woman needs. At least we eat, the men also eat. We wear clothes, the men also wear clothes. The men wear shoes, we also have to wear shoes. Yes, so we have to make it equal	Lucila: No es que el hombre tiene más derecho que nosotros, porque nosotros también somos mujeres y tenemos los mismos derechos que tienen los hombres. [...] Lo que necesita el hombre, lo necesita la mujer. Por lo menos nosotros comemos, los hombres también comen. Nostros vestimos, los hombres también visten. Los hombres calzan, nosotros tambien tenemos que calzar. Sí, entonces tenemos que igualar.
24	Indicator 7.2.5: By 2011, in at least 70% of the integrated organizations of Cafénica, 60% of the scholarships have been proportioned to women; Indicator 7.2.8: By 2013, the women occupy five decision making spaces in each of the base organizations integrated into Cafénica.	Indicador 7.2.5: Al 2011, en por lo menos el 70% de las organizaciones integrantes de CAFENICA, 60% de las becas han sido proporcionadas a mujeres; Indicador 7.2.8: Al 2013, las mujeres ocupan cinco espacios de toma de decisiones en cada una de las organizaciones de base de las integrantes de CAFENICA.
25	Strengthen organizationally and financially, raising the productive yields and ensuring quality to satisfy the demands of the specialty markets and for the improvement of the price of coffee. Diversifying the productive and economic activities, improving the wellbeing of member families, in harmony with the environment and with just and equitable relations.	Fortalecerse organizacional y financieramente, elevando los rendimientos productivos y aseguando la calidad para satisfacer la demande de mercados especiales y el mejoramiento del precio del café. Diversificando las actividades productivas y económicas, mejorando el bienestar de las familias socias, en armonía con el medio ambiente y con relaciones justas y equitativas.
27	Sustainable development with equity	Desarrollo sostenible con equidad
27	To grow in 120 new members of which 40 are women.	Crecer en 120 nuevos socias/os de los cuales 40 son mujeres.
27	To motivate the permanent participation of women, in all the activities and leadership positions of the business, and equity in work and decision-making.	Motivar la participación permanente de la mujer, en todas las actividades y cargos de la empresa y la equidad en el trabajo y la toma de decisions.
29-30	The organizations do not have gender indicators that allow them to measure advances in terms of equity at every level and act on them.	Las organizaciones no cuentan con indicadores de género que les permita medir el avance en terminus de equidad a todos los niveles y accionar de las mismas.
68	Domingo: …tener tierra para un campesino es tener vida.	Domingo: …to have land as a farmer is to have life.

68	Marlyn: …es rara la mujer que… posee tierra.	Marlyn: …it is rare, a woman who… possesses land.
68-69	Lucila: … no es como en algotros casos que, que talvez, talvez vive la pareja, verdad, pero la mujer no tiene ninguna decisión sino que es el hombre. El hombre tiene la escritura de la tierra, el hombre es el que cosecha el café, el hombre lo vende y así, pues, la mujer solo le ayuda, pues, a trabajar. Pero en mi caso yo me siento tranquila porque, porque yo soy la que domino mi… mi, mi trabajo. Soy dueña de mi tierra, mi casita. Yo me siento bien.	Lucila: …it isn't like in some other cases where maybe the husband is living, right, but the woman doesn't have any decision making power, the man does. The man has the land title, the man is the one who harvests the coffee, the man sells it and like this, the woman only helps him in the work. But in my case I feel at peace because I am the one who controls my work. I am the owner of my land, my house. I feel good.
69	Natalia: …por en medio de las cooperativas […] hemos llegado a lo que queremos: la tierra propia.	Natalia: …through the cooperatives […] we have arrived at what we want: our own land.
69	Josefina: …la asignación no le garantiza el derecho a la tierra. En cualquier momento, se la, se, y, se la puede volver a quitar porque el tiene el documento legal.	Josefina: … the assignation [of land] doesn't guarantee the right to land. At any time, [the man] can take it back again because he has the legal document.
69	Gestión ante el estado para la legalización de la propiedad para que esta pueda servir como garantía para los productores (hombres y mujeres).	Negotiation with the state for the legalization of the land title so that it can serve as collateral for the producers (men and women).
70	Natalia: …yo antes que, cuando tuve a mis chigüines chiquitos, yo no salía a trabajar ni a las reuniones porque ¿quién me los iba a cuidar? Y ahora trabajo y salgo porque ya no tengo…no tengo niños chiquitos yo. Nina: Yo digo que si tuviéramos tiernos no viniéramos. Natalia: No viniéramos. ¿Cuándo? No halláramos quien los cuide.	Natalia: …before when I had my small children, I didn't go out to work or to the meetings because who was going to take care of them for me? And now I work and I go out because I don't have small children anymore. Nina: I say if we had small children we would not have come. Natalia: We would not have come. When? We would not have found anyone to look after them.
70	Elena: …cuando hay equidad de género, eh… si el hombre ya vino del trabajo y hay necesidad de talvez de que le ayude a limpiar una libra de frijoles a la mujer, lo hace. Pero a veces en que estén de balde, yo creo que no les ayudan.	Elena: …when there is gender equity, if the man came home from work and there is a need to maybe help clean a pound of beans for the woman, he does it. But sometimes it's no use; I think they don't help them.

70	Lucila: …si hay equidad de género , entonces significa de que, de que el hombre tiene-, puede hacer el trabajo que hace la mujer también. Porque eso es la equidad, compartir el quehacer, verdad, porque si yo soy mujer, este, yo puedo hacer lo de la casa, puedo hacer lo del campo. El hombre también puede hacer lo de la casa, puede hacer lo del campo también. Entonces es una parte de la equidad de género también. Compartir los quehaceres de la casa.	Lucila: …if there is gender equity, then it means that the man can do the work that the woman does as well. Because this is equity, sharing the chores, right, because if I am a woman, I can do the chores of the house, I can do the chores of the fields. The man also can do the chores of the house, he can do the chores of the fields as well. So it's a part of gender equity as well. Sharing the chores of the house.
71	Human nature	Naturaleza
71	A largo plazo […] se puede cambiar. No rotundamente pero en algunos casos.	In the long-term […] it can be changed. Not completely but in some cases.
71	…es un trabajo durito pero hay que hacerlo.	…is hard work but it must be done.
71	…se promueva entre asociados y asociadas la valorización del aporte de las mujeres en el seno de las unidades familiares.	…the valorization of the contribution of the women in the sphere of the family unit is promoted between men and women members.
71	Natalia: …uno sin crédito no, no trabaja. Se pierden las fincas si no hay crédito…	Natalia: …without credit one can't work. They lose their farms if there isn't credit…
72	Gioconda: …porque muchas veces en, en los servicios de crédito, dice, "no, es que tenemos enfoque de género y entonces damos créditos a las mujeres." Pero cuando vas a revisar la cartera, el monto mayoritario colocado está en hombres. Aunque tienen […] mil créditos en mujeres pero tienen cinco créditos que superan el monto colocado en esas mil mujeres. Entonces, ¿cuál es la equidad de género?	Gioconda: …because often in the credit services, they say, 'no, we have a gender focus and so we give credit loans to women.' But when you look at the credit portfolio, the larger invested sums are with the men. Although they have […] a thousand credit loans with women but they have five credit loans [with men] that surpass the invested sum in these thousand women. So, where is the gender equity?
72	Marlyn: Yo pido un crédito según lo que es la capacidad de pago y según lo que necesito. Una persona que tenga una manzana, no va a necesitar 80,000 pesos sino que necesita 5,000. Entonces es dependiendo el, lo que yo tengo, lo que cultivo es el préstamo.	Marlyn: I ask for a credit [loan] according to what my capacity of payment is and according to what I need. A person who has one *manzana* [of land] is not going to need 80,000 *pesos* but needs 5,000. So depending on what I have, what I farm, this is [the size of] the loan.
72	Natalia: …casi no hay mucha capacidad de crédito. Nos dan una cuarta parte de lo que talvez uno pide. Eso es lo que	Natalia: …there is almost no capacity for credit. They give us maybe a quarter of what one asks for. That is what we need the

	nosotros necesitamos más…	most…
73	Josefina: …PROCOCER les puede resolver una parte de sus, de sus demandas, de sus intereses. Pero ellas necesitan otros vínculos para desarrollarse, para empoderarse, para lo-, para alcanzar estos mismos indicadores de género.	Josefina: …PROCOCER can resolve a part of their demands, their interests. But [the women] need other contacts to develop themselves, to empower themselves, to reach these same gender indicators.
74	…no hay ninguna diferencia, sea hombre sea mujer puede participar.	…there aren't any differences, be it a man or a woman, they can participate.
74	Lucila: …tiene que ser 50%.	Lucila: …it has to be 50%
74-75	Massiel: …como yo de mi parte un cargo grande, no lo agarro por lo que también la dificultad en la, en la letra o en la sabiduría que apenas segundo grado. Nina: Sí, porque […] es cierto que no va a poner una gente que no tenga capacidad. Natalia: Sí, no tiene capacidad. Nina: Es que la capacidad que tiene usted [Natalia], no la tengo yo. Natalia: Ni la tiene ella [Massiel].	Massiel: … as for my part, a big leadership position, I don't get one because of my difficulty with letters or with knowledge, I barely have second grade [education]. Nina: Yes, because… it's true that [the cooperative] isn't going put a person in who doesn't have the capacity. Natalia: Yes, doesn't have the capacity. Nina: The capacity that you [Natalia] have, I don't have. Natalia: Nor does [Massiel] have it.
75	Jannie: …¿qué cosas limitan su participación en los cargos de PROCOCER? Marlyn: Para ustedes ser, por ejemplo, delegada, directiva… Elena: Ninguno, solo es disponerse porque uno tiene que disponerse a ir a capacitarse […] Me parece que eso es lo más trabajoso…	Jannie: …what things limit your participation in PROCOCER's leadership positions? Marlyn: For you to be, for example, a delegate, director… Elena: Nothing, only to be available because one has to be available to go get trained […] It seems to me that this is the most laborious...
75	Marlyn: …más que todo las mujeres deciden a veces no tomar el riesgo, pues, para no quedar mal en esas tomas de decisiones.	Marlyn: …more than anything, the women decide sometimes not to take the risk so that they won't do a bad job in these decision-making positions.
76	Marlyn: Esa es una de las brechas que tenemos que, que así se dicen, 'la mujer no puede ser ingeniera sino que es	Marlyn: It is one of the gaps that we have, that they say, 'women can't be engineers, it is men's work. Women can only be

	trabajo de hombre. La mujer solo puede ser secretaria.'	secretaries.'
76	Marlyn: …tenemos hombres en las directivas que sí, se preocupan por las mujeres. Y a veces, a veces podemos tener mujeres […] y no se preocupan por nosotras las mismas mujeres.	Marlyn: …we have men in the board of directors that yes, are concerned about the women. And sometimes we can have women […] and they are not concerned about us women.
76	Gioconda: …hay una cultura en las técnicas, en las ingenieras agrónomas, en las administradoras, en las compañeras… también muy patriarcal. Entonces van al campo las técnicas agrónomas y la socia es la beneficiaria, pero con quien hablan es con el marido de la socia. […] '¿está don Fulano? Es que quiero que vayamos a ver el café,' por ejemplo. Y se dirigen al marido de la socia y no a ella. '¿Me regala un cafecito, doña Fulana? ¿Cómo ha estado? Mire, y los niños? ¿Y cómo han estado?' […] Y la miran solamente a través del trabajo reproductivo. Y se relacionan con ella, de mujer a mujer, solamente en el nivel del trabajo reproductivo y no así como socia capaz de controlar sus recursos.	Gioconda: …there is a culture in the women technical advisors, in the women agronomists, in the women administrators, in the women colleagues… also very patriarchal. So the women technical agronomists go to the farms and the woman member is the beneficiary, but the person they talk to is the husband of the woman member. […] 'Is Mr. Fulano here? I want us to go look at the coffee,' for example. And they direct themselves to the husband of the woman member and not to her. 'Bring me a cup of coffee, Mrs. Fulana? How have you been? And the children? And how have they been?' […] And they see her only through her reproductive work. And they relate themselves with her, woman to woman, only at the level of reproductive work and not as a woman member capable of controlling her resources.
77	…porque la unión hace la fuerza.	…because union gives us strength.
77	Gioconda: …ven que es injusto que las mujeres no estén participando y lo, lo hacen público.	Gioconda: …see that it is unjust that the women aren't participating and they make it public.
78	Jitzy: Yo no sé, no sé nada de, de… de leer, no sé nada. […] yo no estuve en ninguna escuela […] Porque en el tiempo que yo me crié, me crié en una montaña y no habían maestros. El que, eh, echaba los hijos a la escuela, ellos eran los que pagaban maestros privados a las casas para que le enseñaran a leer. Nosotros no teníamos esa […] ayuda, verdad, para poder estudiar.	Jitzy: I don't know how to read, I don't know anything. […] I was not in any school […] because in the time that I grew up, I grew up in a mountain and there weren't teachers. Those that put their children in school, they were those that paid private teachers in their homes so that they taught them to read. We didn't have this […] help, right, to be able to study.
78	Nina: Ay, mi sueño es preparar a mi hija, pues. Hasta donde ella quiera.	Nina: My dream is to educate my daughter. As far as she wants to study.

	Natalia: Yo también. La única que le gustó el estudio fue a la Darling. […] yo le voy a dar el estudio hasta que yo me muera.	Natalia: Me, too. The only one who liked to study was Darling. […] I am going to give her education until I die.
79	Carmen: Esa beca es imposible. Yo soy vieja de estar pidiendo.	Carmen: That scholarship is impossible. I am old to be asking for it.
79	Marlyn: …han sido más preparados los hombres que las mujeres.	Marlyn: …the men have been more educated than the women.
79	…un plan de alfabetización para disminuir a la mitad el analfabetismo functional entre los asociados (hombres y mujeres) mediante el establecimiento de alianza con MECD.	…a literacy plan to diminish by half the functional illiteracy among the men and women members through the establishment of an alliance with MECD.
80	…PROCOCER mantiene una dinámica de fortalecimiento de capacidades *permanente*. Aquí vivimos capacitando a la gente casi diario…	…PROCOCER maintains a dynamic of the *permanent* strengthening of capacities. Here we are giving workshops to the people almost daily…"
80	Marlyn: …en las capacitaciones […] hay un eje como transversal de la equidad de género en PROCOCER. En toda capacitación se trata un poco de lo que es género.	Marlyn: …in the workshops […] there is a transversal focus of gender equity in PROCOCER. In all the workshops there is a little bit of gender.
81	Es duro, pues, para los hombres pero hay, hay que hacerlo.	It's hard for the men, but it must be done.
81	Nina: …porque en género, de nada sirve capacitar y capacitar a las mujeres y los hombres nada.	Nina: …because in gender, it's no use to give and give workshops to the women and the men nothing.
82	Marlyn: …si tenemos una mujer con una autoestima buena […] yo creo que ella tiene como el poder de participar, el poder de tomar decisions, está fuera de un, algo oprimido.	Marlyn: …if we have a woman with good self-esteem […] I think that she has the power to participate, the power to make decisions, is apart from something, something oppressed.
82	Josefina: … porque tiene que ver también con cómo te estás atendiendo vos tu, tu salud. Si estás, si tenés una autoestima alta, te preocupás por tu salud. Sos vos la prioridad, no son los hijos e hijas.	Josefina: …because it has to do also with how you are attending to your health… if you have high self-esteem, you are concerned for your health. You are the priority, not your sons and daughters.
83	Gioconda: El servicio financiero *por si* no empodera a las mujeres, verdad.	Gioconda: The financial service *in itself* doesn't empower women.
83	Hay un dominio de los dos, pues.	There is control from both of them.
83	Jitzy: …hay hombres que, que se meten en el hogar hasta por un huevo de una gallina.	Jitzy: There are men who get involved in the home for as little as a chicken's egg.

		Massiel: Yes, it's true.
	Massiel: Sí, es cierto. Jitzy: […] talvez llega alguien a buscar una cosa, y le dice, 'no, es que mi marido no esta, no te puedo vender ni un huevo ni una gallina.' Carmen: Sí, 'hasta que él venga,' dicen.	Jitzy: […] maybe someone arrives to look for something, and [the wife] tells him, 'no, my husband isn't here, I can't sell an egg nor a chicken.' Carmen: Yes, 'until he comes back,' they say.
84	Nina: La mayoría de los hombres no les gusta que la mujer ande saliendo.	Nina: The majority of the men don't like their women going out.
84	Yeni: Por lo menos mi mamá nunca […] dice para donde va aunque esté mi papi en la casa. Esa agarra su cartera, se baña y se va. '¿Y su mama?' ¡A saber donde anda! Es que lo que pasa que cuando una mujer tiene su trabajo, […] ella sabe cuales son sus responsabilidades y cuando no ha estado acostumbrada a atenerse a su marido, me entiende, ella tiene que, que velar por sus, por sus cosas.	Yeni: At least my mom never […] says where she goes even though my dad is at home. She takes her wallet, showers, and leaves. 'And your mom?' God knows where she is! That's what happens when a woman has her work, […] she knows what her responsibilities are, and when she isn't used to taking care of her husband, she has to watch over her own things.
84	…aunque sea de una comunidad, pero el agarra para donde el quiera […] mientras que la mujer siempre nos han tenido así.	…even though they are from one community, but the man goes where he wants to […] while the women, they have always kept us [in the home] like this.
86	5 Actividades económicas implementadas por la cooperativa.	5 economic activities implemented by the cooperative.
86	Incrementar a 8,000 libras, el volumen de venta de café molido El Doradito.	Increasing the volume of the sale of ground coffee to 8,000 pounds.
86	Al 2013, desde el MMFC se habrá realizado al menos 1 campaña en 100% de las organizaciones CAFENICA.	By 2013, MMFC will have realized at least one campaign in 100% of the Cafénica organizations.
86-87	Marlyn: Digo que no, no vaya, porque […] no van a dar la información. Jannie: Ah… pero con la encuesta, ¿no…? Marlyn: Es que no creo que den una información veraz. Jannie: Ah… ¿ellos no van a escribir la verdad respuesta?	Marlyn: I say that doesn't go because […] they are not going to give the information. Jannie: But with the questionnaire [of the PROCOCER database], it doesn't…? Marlyn: It's that I don't think that they give true information. Jannie: They aren't going to write the true response?

	Marlyn: No creo yo.	Marlyn: I don't think so.
91	…es el negocio principal de la cooperativa…	…is the principle business of the cooperative…
92	…la igualdad de oportunidades para hombres y mujeres en un proceso de desarrollo. […] que la mujer viene con los mismos requisitos que vienen los hombres y tienen los mismos beneficios que tienen los hombres.	…the equality of opportunities for men and women in a process of development. […] that the women come with the same requirements that the men come with and have the same benefits that the men have.
92	No. No pueden haber diferentes. Son las mismas.	No. They can't be different. They are the same.
92	Marlyn: No miro que, que eso nos, nos limite. No, no limita porque sí hay, tenemos mujeres que sí, pueden cumplir esos requisitos.	Marlyn: I don't see that that limits us. It doesn't limit [us] because yes, we have women who yes, can fulfill these requirements.
92	…lo que más limita la participación de las socias es tema de-, la parte cultural, sentirse completamente dependiente de, del marido o del jefe. Yo creo que es más cultural porque los espacios están, eh, las condiciones están…	…what limits the participation of the women members most is the cultural part, feeling completely dependent on their husband or the boss. I think that it is more cultural because the spaces are there, the conditions are there...
93	Hablan del mismo idioma, eh, conocen de los niños. yo creo que eso da más confianza, pues, que vaya Marlyn a visitar a una mujer a que vaya Nataniel o que vaya cualquiera de los técnicos. Creo que eso es un elemento importante.	…they speak the same language, they know the children. I think that gives more confidence, that Marlyn goes to visit a woman than if Nataniel goes or any other of the men technical advisors. I believe that is an important element.
93	Marlyn: Las mismas oportunidades, tanto para los hombres como mujeres, adolescentes y adolescentas, que niños y niñas, pues, en todo el ámbito.	Marlyn: The same opportunities, as much for men as women, teenage boys and girls, as boy and girl children, in all areas.
94	Domingo: … parte de la sostenibilidad de la cooperativa es que aquí hay una integración familiar, no solo el socio sino también la esposa. La medida que la familia se integra a trabajar por el modelo empresarial sostenible como el modelo empresarial cooperativo, nosotros creemos que eso le va a dar más vida, más base, más sustento a este proceso que llevamos eh, cooperativamente.	Domingo: …part of the sustainability of the cooperative is that there is an integration of the family here, not only the man member but also his wife. To the extent that the family integrates to work for the sustainable enterprise model as the cooperative enterprise model, we believe that this is going to give more life, more base, more sustainability to this process that we lead cooperatively.
93	Marlyn: No lo miro tan bueno… desunirse porque somos cooperativas	Marlyn: I don't see it as very good to disunite because we are mixed cooperatives

	mixtas de hombres y mujeres con sus mismos derechos y sus mismos deberes.	of men and women with the same rights and the same duties.
94	Domingo: …antes solo el hombre se movilizaba a hacer sus gestiones, diferentes gestiones. Ahora también movilizan a la mujer. Ya hay un cambio de rol, ya no le toca al hombre sino que también a la mujer. Antes levanta a las 4, solo la mujer a, a… a prender el fuego y hacerle la comida. Ahora también tiene que levantar el hombre porque la mujer tiene que salir y tiene que quedar pendiente a los chigüincitos. Sí, y son cambios reales que están dando.	Domingo: …before only the man earned an income, working different jobs. Now the woman is also looking for ways to generate an income. There is now a change in role, now it not only falls on the man but also the woman. Before the woman got up at 4 [in the morning] to light the fire and prepare the food. Now the man also has to get up because the woman has to go out and the man has to stay to look after the children. Yes, and they are real changes that are happening.
94	…habría que decirle a los hombres […] que le dé una parte de la tierra. Entonces, nos apuntamos por lo menos un 30%.	…we would have to tell the men […] to give a part of the property to the women. So, we aim for at least 30%.
94	Elena: …no pensé en eso.	Elena: …I didn't think of that.
95	Jannie: …por ejemplo, ¿cómo está su cultivo en su sueño? Nina: En, real. Jannie: Real, como… Por ejemplo, ¿es diferente? Yeni: Que si tiene un cultivo ahorita y en sus sueños ¿cómo, cómo lo mira? ¿Cómo se ve? Nina: Sí, porque, si lo, lo tengo, este, lo, los, los sueños por, como tengo en la mente… Yeni: ¿Cómo lo espera ver entonces? Nina: Mejor. Jannie: ¿Cómo? ¿Cómo es mejor? Nina: Mejor, este…	Jannie: …for example, how is your crop in your dreams? Nina: In, real. Jannie: Real, like… For example, is it different? Yeni: That if you have a crop now and in your dreams, how does it look to you? How do you see it? Nina: Yes, because if I have the dreams, as I have in my mind… Yeni: How do you hope to see it then? Nina: Better. Jannie: How? How is it better? Nina: Better, that is…
95	Nina: Mi sueño es sembrar más café.	Nina: My dream is to grow more coffee.
95	Lucila: …para mi soñar, verdad, de que, de que la equidad de género está como debe de ser, verdad. Es una, es una gran	Lucila: …for me, [I dream] that gender equity is as it should be. It is a great advantage as a woman because at least if

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	ventaja, verdad, como mujer porque, porque por lo menos si, si hay una equidad de género significa de que, de que no hay violación entre la familia, que vivimos bien, pues, dentro de la familia. Y cuando una familia vive bien significa de que, de que todo marcha bien, verdad. Si yo sueño de que, de que vivo bien con mi familia, que trabajo igual, entonces significa que hay una buena cosecha y de esa buena cosecha, hay una buena economía en la, en el hogar. Hay salud, hay todo, verdad.	there is gender equity, it means that there is no abuse in the family, that we live well within the family. And when a family lives well, it means that everything is going well. If I dream that I live well with my family, that I work equally, then it means that there is a good harvest and from this good harvest, there are good finances in the home. There is health, there is everything.
96	Lucila: …hay maridos que no les gusta que las mujeres planifiquen también. Sí, no les gusta. Les gusta que la mujer tenga el montón de chigüines para que no pueda salir de la casa.	Lucila: …there are husbands that don't like women planning as well. Yes, they don't like it. They like it when the woman has a bunch of children so that [she] can't leave the house.
96	… antes había ese machismo y ahora ha cambiado todo eso.	…before there was this *machismo* and now all of this has changed.
96	Elena: Es que viéndolo bien, no hay equidad de género, ¿verdad? Porque mujeres que obtengan cargos en, en la cooperativa yo no veo. O sea, en esos cargos grandes no, no hay mujeres.	Elena: It's that, looking closely, there isn't gender equity, is there? Because I don't see women getting leadership positions in the cooperative. That is, in the big leadership positions there aren't women.
96	Yeni: No, capacidad, todos tenemos capacidad. Lo que pasa es que hay que desarrollarla.	Yeni: No, capacity, we all have capacity. What happens is that capacity must be developed.